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13. ABSTRACT (Maximum 200 words)

This study is an analysis of Confederate cavalry operations in the Valley Campaign-- 5 November 1861 through 10 June 1862. In a campaign dominated by the leadership of Major General Thomas "Stonewall" Jackson and his "foot cavalry," what role did his mounted arm play in the campaign?

This study begins with a brief review of the historical evolution of American cavalry, explaining the differences between American and European cavalry. The study also includes background information on key issues of the campaign's cavalry leadership, organization, logistics, and tactics. The majority of the thesis discussion concerns the campaign's cavalry operations, including an evaluation of the cavalry's performance.

The conclusion of the thesis is that Jackson's cavalry arm significantly contributed to the Confederate success in the campaign. Cavalry contributions were strongest at the operational level of war. Despite their contributions, the cavalry was inefficient. Organizational turmoil, poor logistical support, high operations tempo, and limited training worked in concert to reduce efficiency. Although completed over one hundred years ago, the cavalry operations of Shenandoah Valley Campaign has some particular lessons-learned that still apply today. Among these are support for the soldier in the field, innovation and improvisation, combat leadership, leadership development, and training.

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EFFECTIVE, BUT INEFFICENT

A thesis presented to the Faculty of the U.S. Army
Command and General Staff College in partial
fulfillment of the requirements for the
degree

MASTER OF MILITARY ART AND SCIENCE
General Studies

by

MICHAEL S. LYNCH, MAJ, USAF
B.S., U.S. Air Force Academy, Colorado, 1986

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MASTER OF MILITARY ART AND SCIENCE

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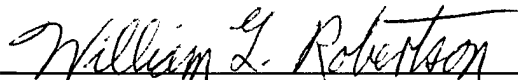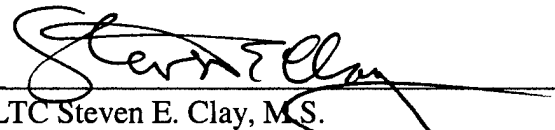Name of Candidate: MAJ Michael S. Lynch

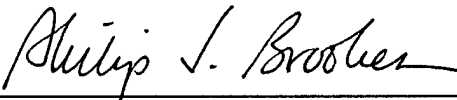Thesis Title: Cavalry in the Shenandoah Valley Campaign of 1862: Effective, but Inefficient.

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ABSTRACT

CAVALRY IN THE SHENANDOAH VALLEY CAMPAIGN OF 1862: EFFECTIVE,
BUT INEFFICENT by Major Michael Sullivan Lynch, USAF, 278 pages.

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5 November 1861 through 10 June 1862. In a campaign dominated by the leadership of
Major General Thomas "Stonewall" Jackson and his "foot cavalry," what role did his
mounted arm play in the campaign?

This study begins with a brief review of the historical evolution of American cavalry,
explaining the differences between American and European cavalry. The study also
includes background information on key issues of the campaign's cavalry leadership,
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As with any endeavor, this thesis was completed through the assistance of many people. First, I wish to thank my thesis committee for their time, effort, and expertise. Their input was invaluable. Secondly, I wish to say a special thanks to Mrs. Nola Sleevi for her commitment of time, effort, and talent. With a solid background in history and an enthusiasm for the Civil War in particular, her knowledge and insight into the Shenandoah Valley Campaign were extremely valuable. Her willingness to help with this project was noble.

To all my family, including my parents, I can not express enough the importance of your support and encouragement. A special thanks is due to my wife, Shelli, my daughter, Sarah, and my son, Connor. Everyone sacrificed and each one contributed in his or her own unique way. No one better expressed the joy of seeing this project completed than my four-year old son did when, dancing and jumping up and down said, "Daddy, you're done with your paper?"

Finally, I wish to dedicate this work to my father, Thomas Joseph Lynch. Throughout the year, he provided constant encouragement. He was the first to recognize that this thesis was not a paper, but a book. Since the beginning of my life, my father has expressed the greatest degree of support for my endeavors. This project was no exception. In this year, my father battled against cancer in a positive and tireless manner, inspiring us all. As much as Turner Ashby is a hero to the South, so my father is to me.

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CHAPTER 1

INTRODUCTION

If the Valley is lost, Virginia is lost.[1]

Major General Thomas J. "Stonewall" Jackson,
Stonewall in the Valley

Jackson shared this thought in a letter to Congressman Alexander R. Boteler on 3 March 1862. In this letter, Jackson explained both the serious threat facing the Confederates in the Shenandoah Valley and the need for additional soldiers to meet this challenge. Expressing an attitude that would characterize the campaign, Jackson anxiously anticipated an opportunity to eject Virginia's invaders.

Preamble

"Stonewall" Jackson is already the subject of many military histories. In particular, Jackson's Shenandoah Valley Campaign has been a source of particular interest. Can one add anything more to the body of existing works on this subject? Jackson's infantry developed a reputation during the Valley Campaign for its mobility and earned the nickname of "Jackson's foot cavalry." Considerably less written material about his Confederate cavalry forces in the Valley exists.[2] What were the accomplishments of Jackson's mounted cavalry? This area will be the focus of this thesis. In particular, this thesis will address one primary question: Did Confederate cavalry operations significantly contribute to the success of the Confederate 1862 Shenandoah Valley Campaign?

Before beginning, it is important to do some foundational work. An understanding of the Valley and its relative significance to both the North and the South is important. A brief overview of the broader context of the campaign is also necessary because it establishes the canvas upon which the Valley Campaign was painted. Additionally, it is equally important to

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consider, in terms of its purpose, both what this thesis is as well as what it is not. Finally, a firm foundation demands some indication of the relevance of the thesis to military operations of today and to those operations in the future.

<u>Description of the Shenandoah Valley</u>

The Shenandoah Valley is a region that runs along the western edge of current day Virginia. (See Figure 1.) Flanking the Valley are two mountain ranges--the Blue Ridge in the east and the Alleghenies, of which the Shenandoah Mountains are a part, are in the west. Both of these mountain ranges run along a northeastern-southwestern axis. The Potomac River defines the northern boundary. From there, the Valley runs 150 miles southwest to the James River. There are three major rivers that flow in the Valley--the Shenandoah in the east, the Big Cacapon in the center, and the South Branch of the Potomac in the west. Each of these rivers flows northward into the Potomac. Consequently, the southern portion of the Valley constitutes the upper Valley and the northern portion constitutes the lower Valley. Because of the mountains that bound it, the Valley formed a natural boundary between the eastern and western theaters of the Civil War.

During the Civil War, the portion of the Valley between Staunton in the south and Harpers Ferry at the northeastern point was highly contested. In the lower Valley, thirty miles southwest of Harpers Ferry lies the town of Winchester. "By one estimate, Winchester changed hands more than seventy times during the war."[3] The importance of the Valley began with the burning of the U.S. Armory in Harpers Ferry on 18 April 1861--the day after Virginia seceded from the Union. The Shenandoah Valley's importance continued even after the final battle in the Valley, Cedar Creek, ended with Union occupation of Staunton on 3 March 1865. After this final Valley battle, Major General Phillip H. Sheridan began a destruction campaign in the Valley

similar in scope to Sherman's March to the Sea. David Martin described Sheridan's destruction campaign in the following passage.

> He [Sheridan] withdrew down the Valley continuing his devastation, which rivaled Sherman's in Georgia, though Sheridan did not burn civilian homes. . . . When he was done robbing and burning the granary of the Confederacy, Sheridan remarked, "A Crow would have to carry its own rations if it had flown across the Valley." [4]

After Sheridan's march down the Valley, the contest for the Valley ended.

From the Confederate point of view, the Valley was important for several reasons. Firstly, the region supplied critical resources for the war effort. Therefore, many considered the Valley the "breadbasket" of the Confederacy. Secondly, the mountains afforded the Confederates a concealed approach to the North. The Confederates used this approach for their two major northern campaigns, the Maryland Campaign in 1862 and the Pennsylvania Campaign in 1863. Major General Jubal Early also used the Valley to launch attacks into the North. In July of 1864, Early launched raids into Maryland and Pennsylvania, burning Chambersburg, Pennsylvania. He also launched an unsuccessful attack on Washington, D.C., at Fort Stevens. The concealed approach provided by the Valley constituted a "backdoor" into the North. Throughout the war, the potential use of this backdoor as an avenue of approach on Washington required the deployment of significant Union resources into the Valley or in the region between the Valley and Washington, D.C.

Geographically, the Valley was of less value to the Union, except for the lower Valley. In particular, the last few miles of the lower Valley were extremely important to the North because of the transportation arteries in the area. These arteries included both the Baltimore and Ohio (B&O) railroad and the Chesapeake and Ohio Canal (C&O). The B&O railroad was the major transportation artery for the North, connecting the eastern and western theaters of the war. The B&O railroad, one of America's major railroads by the 1860s, was primarily east-west oriented and made its way across the lower Valley along the southern bank of the Potomac. The

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B&O ran from Baltimore to Cincinnati and included more than 500 miles of track. The assets of the B&O Railroad Company totaled more than $30 million--a staggering amount in 1861.[5] Although the majority of the B&O rail lines ran through Virginia, which included West Virginia in 1861, both antagonists laid claim to the B&O railroad at the war's outset. The Union reacted quickly at the beginning of the war and was able to secure the B&O terminals at Baltimore, Maryland, and Wheeling, Virginia (now in West Virginia). "Thereafter the Confederacy sought to cripple it [the B&O railroad], and the South would damage this line more frequently and more extensively than any other."[6]

The upper Valley was of less importance to the North because of several reasons. To begin with, any approach down the Valley funneled their forces away from the Confederate capital in Richmond. In addition, Union forces in the Valley could be isolated from other forces in the East because of the limited number of mountain passes.

Throughout the war, the Valley was hotly contested. For the most part, the North was able to maintain control of the lower Valley while the South was able to maintain control of the upper Valley.[7] Apart from the area in the vicinity of the B&O and C&O, both antagonists fought for control of the remainder of the Valley because of the advantages the geographical region provided the Southern effort--the Confederates fighting to gain those advantages and the Union fighting to deny those advantages.

Overview of the Valley Campaign

Several different campaigns occurred in the Valley throughout the war, but Major General "Stonewall" Jackson's 1862 Campaign in the Valley stands preeminent among them. It was not only the success of the campaign itself but also the period in which that success occurred that rates it so highly. In order to understand the importance of Jackson's Valley Campaign, one must understand the Confederate situation at the time.

To put it mildly, early 1862 represented a low point for the Confederacy. Confederate President Jefferson Davis used the word "disasters" in his February inaugural address to describe the situation. In North Carolina, the Union had captured Roanoke Island and had begun missions deeper into the state. The situation was even worse in the West.

> West of the Alleghenies, Southern armies were retreating along a four-hundred-mile front. The Confederates were defeated at the battle of Mill Springs, Kentucky, during January. In Tennessee, Forts Henry and Donelson had surrendered to Union Major General Ulysses S. Grant by mid-February, and the defense of Tennessee collapsed with the loss of fourteen thousand prisoners. Irreplaceable foundries and rolling mills fell with Nashville to union Brigadier General Don Carlos Buell. Missouri and Northern Arkansas were lost forever when a Confederate army was mauled at the Battle of Pea Ridge in early March.[8]

The situation in Virginia was also critical. Faced with the growing number of enemy troops, General Joseph Johnston evacuated the Manassas area in February. The Federals quickly seized Manassas Junction. In addition, laws passed by the Virginia legislature, which granted furloughs for reenlistment, had greatly reduced the numerical strength of Southern armies in the state.[9] In contrast, Federal Major General George B. McClellan had built and trained an army of more than 150,000 and was preparing for a drive south to the Confederate capital in Richmond. It was against this backdrop of Confederate disasters and the growing Federal threat to Richmond that Jackson was going to conduct his campaign.

Jackson began his command in the Valley in November of 1861. This command came about as the result of the restructuring of the Confederate armies in Virginia. In late October, Richmond had created the Department of Northern Virginia, which consisted of all of Virginia north of the Rappahannock River.[10] General Joseph E. Johnston assumed command of the Department of Northern Virginia. Major General Jackson, as a subordinate of Johnston, took command of the Shenandoah Valley portion of the Department of Northern Virginia. This portion included the entire region of the Valley, as previously described, north of the town of Staunton.

When Jackson took command, his forces numbered 1,500 militia. When Major General

William W. Loring's Army of the Northwest, operating in Virginia west of the Alleghenies

(current day West Virginia), joined Jackson's army, the size of Jackson's army increased

substantially. His army now numbered about 7,500 volunteers, 2,200 militia, and 650 cavalry.[11]

As the campaign progressed, for a number of different reasons, the size of Jackson's army would

initially dwindle. Although Jackson's command received Major General Richard S. Ewell's

forces in early May, Jackson's efforts through most of the campaign consisted of a force of about

6,000.

Jackson's defense of the Valley was conducted against three particular Union armies--

Major General John C. Frémont's army in Western Virginia, Major General Nathaniel P. Banks'

army in the lower Valley, and Major General Irvin McDowell's corps in Manassas. (For most of

the campaign, McDowell's forces remained unengaged by Jackson's forces, but all of Jackson's

actions carefully considered the disposition of McDowell's forces, which were camped near

Manassas for most of the campaign.) Throughout the campaign, Jackson was not only able to

prevent the consolidation of the Federal armies; he was able to exploit opportunities and engage

different elements of these armies at different times. This resulted in five major battles, four of

which were tactical victories. The first battle, Kernstown, which was a tactical defeat, was still a

strategic success. Because of Jackson's engagement of Banks' army at Kernstown, McDowell

and his corps did not initially deploy south of Manassas. Before Kernstown, McDowell's corps

was in the process of moving south to join General McClellan's Peninsula Campaign against

Richmond. The majority of these forces would reach McClellan, but not until substantially late

in McClellan's campaign. At both the tactical and strategic levels, Jackson's Valley Campaign

was highly successful.

> In the space of the weeks (22 March – 9 June 1862) he marched his men up and down the
> length of the Shenandoah Valley, fighting five battles and defeating three different

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enemy armies. In addition, his movements tied down over 70,000 enemy troops--a force over four times larger than his own--whose aid was badly wanted by Union Major General George B. McClellan for his attack on Richmond, the capital of the Confederacy.[12]

Throughout the Valley Campaign, Jackson was not only able to use his relatively smaller force to tie down several Union armies of substantially larger size but also was able to exploit opportunities to engage and defeat these Union armies, or smaller portions of them, on the field.

Jackson's victories in the spring of 1862 provided some of the few successes for the Southern cause at that time. Additionally, Jackson's army contributed to the defeat of McClellan's Peninsula Campaign against Richmond. Initially, while Jackson's army operated in the Valley, the Valley army indirectly contributed to the defense of Richmond by diverting substantial Federal forces from reaching Richmond. This contribution became direct when Jackson's army was later committed directly to the defense of Richmond.

The Thesis

Although the Valley Campaign has been the subject of many an article, thesis, and book, still more can be learned by looking at the subject in a different way and from a different perspective. The focus becomes clear by considering two opposing trains of thought. Firstly, it is important to understand what the thesis is not. Secondly, it is important to understand what the thesis attempts to be.

In order to understand the purpose of this thesis, it is important to understand what the thesis is not. The strategic importance of the Shenandoah Campaign to the Confederate cause continues to be a source of debate. Because of the period of the war in which the campaign took place, many interesting "what if" scenarios naturally follow from a study of the campaign. This thesis will avoid these strategic issues. The thesis will not consider the broader implications of the campaign itself and the significance these implications might have had on the actual outcome of the campaign or any other potentially interesting possibilities that stem from these

implications. This thesis will assume that the campaign was successful, a generally agreed to supposition, and limit any further discussion along this line. It would be impossible to analyze the Valley Campaign without some consideration of its foremost leader, Jackson, but it is not the purpose of this thesis to make it into a critique of or treatise on Jackson. The exploits of Jackson's able infantry force are included in many of the historical writings about the Valley Campaign. Jackson's infantry deserve the well-earned title of "foot cavalry" for, among other things, their impressive display of mobility during the campaign. Clearly, this played a significant role in the outcome of the campaign. As much as is possible, this thesis will avoid this area of study. Given these constraints, what will the thesis be?

Did Confederate cavalry operations significantly contribute to the success of the Confederate 1862 Shenandoah Valley Campaign? This is the primary question. Consequently, this thesis will focus on the role of Confederate cavalry operations in the campaign. The campaign period of review will begin with Jackson's assumption of command in the Valley in November of 1861 and end with the campaign's final battle, the Battle of Port Republic, on 9 June 1862.

Before tackling the primary question, some preliminary review is necessary. This preliminary information will cover two areas. The first area is a brief historical review of cavalry operations, chapter 2. The second area is a more focused review of conditions at the start of the war, chapter 3.

The historical review of cavalry operations, conducted in chapter 2, will cover three areas. The first is a brief historical look at the European cavalry model. The second is a historical review of United States cavalry model. The last area will analyze the implications of the American cavalry experience.

Chapter 3 serves as a transition between the prewar history of cavalry operations in America and the conditions at the beginning of the Valley Campaign. This chapter will consist of three areas. First, background information about the key leaders who will affect cavalry operations during the campaign is necessary. Second, the thesis will review several key organizational issues affecting the cavalry during the campaign. Third, a discussion of several logistical issues is necessary. Fourth, the chapter will identify the key tactical missions conducted by the cavalry during the campaign.

Once completed, the thesis will include a direct review of the cavalry operations throughout the campaign. In order to do this, the period of the campaign is dissected into distinct chronological slices, or chapters, and then analyzed. The general layout of each of these chapters will encompass the following: Valley army operations, cavalry operations, and assessment of cavalry operations. This cavalry analysis will encompass chapters 4-7.

The final chapter will include three areas. First, the chapter will answer the primary question directly. Second, cavalry performance will include a review of the four primary elements identified in chapter 3--leadership, organization, logistics, and tactics. Third, the chapter will identify applicable lessons learned from the cavalry aspect of the campaign that have applicability for future military operations.

<u>The Relevance of the Thesis</u>

The potential value of this thesis occurs at two different levels--historical accuracy and future applicability. To begin with, cavalry operations in the Valley have not been as thoroughly studied as other areas of the campaign. This study will provide additional information on the contributions, or lack thereof, of cavalry operations to the Valley Campaign. Beyond the historical recollections of the author, the greater value of this thesis lies in the application of

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lessons from the Valley Campaign to military operations of the future. What insight does this thesis have for today's and hopefully tomorrow's military forces?

Some historians have concluded that cavalry contributions to the Civil War effort were so minuscule that one may ignore them. One of the prominent historians to hold this opinion is Paddy Griffith, a senior lecturer in war studies at the Royal Military Academy. His opinion appears is based on two primary facts. In most Civil War battles, cavalry losses were extremely small. For example, two of the bloodiest Civil War battles were Fredericksburg and Antietam and cavalry loses in these battles were extremely low. There were only eight Union cavalry casualties at Fredericksburg, less than one in 1,500 of total Union casualties, and only twenty-eight cavalry casualties for both Union and Confederate armies at Sharpsburg.[13] The second reason for Griffith's opinion lies in the absence of mounted charges in the Civil War. According to Griffith, the Union's Army of the Potomac, throughout the entire war, made only five mounted charges against infantry in the course of a major battle which was less than Marshal Ney's cavalry made in three hours at Waterloo.[14] By these measures, cavalry's contribution to the war may be insignificant; however, Griffith's premise is suspect. Should an assessment of cavalry operations in the Civil War depend on an application of the Napoleonic model? Are mounted charges against infantry and direct involvement in pitched infantry battles the appropriate measures of a cavalry unit's value?

Griffith's assessment of cavalry's contribution to the Civil War is not unique. It is very common for historians to measure Civil War cavalry operations against the Napoleonic standard. Cavalry operations in the U.S. Civil War were distinctly different from cavalry operations in the Napoleonic wars and warrant a different type of review. As such, the application of Griffith's approach to cavalry operations in the Civil War is suspect because it applies a standard that may not fit. Chapter 2 will help clarify the difference between American and European views on

cavalry and will provide a better perspective from which to evaluate cavalry operations in the Valley. The intention here is not to determine in advance that Confederate cavalry operations were significant to the Civil War or, within the scope of this thesis, significant to the Valley Campaign, but rather to say that it is inappropriate to dismiss cavalry operations altogether because they fail to fit the Napoleonic mold.

The nature of warfare or rather, the way the U.S. armed forces are viewing warfare is changing. The world is very different today than it was only a decade ago. "The end of the Cold War's bipolar stability allowed a more rapid emergence of regional instabilities and transnational challenges, such as terrorism, aggressive behavior by rogue states seeking power and resources, and the proliferation of weapons of mass destruction."[15] The traditional roles of U.S. armed forces are changing. The size, composition, and equipping of forces are changing. Since the end of the Cold War, the U.S. armed forces have experienced significant reductions in size even though their operations tempo has increased. Operations are becoming more reliant on joint cooperation, multiservice and multiagency, and often involve forces from several nations. The armed forces of the U.S. are truly doing more with less and the trend is likely to continue in the near future.

Is the situation facing the U.S. armed forces today virgin ground or can lessons be learned from history? Clearly, the answer to the first part of this question is "no" and the answer to the second part is "yes." As one studies the American Civil War, particularly from the Confederate perspective, "more with less" quickly comes to mind. The Confederate cause is replete with examples of leaders in the field being asked to do the near impossible with nearly nothing. Jackson's Campaign in the Valley is but one example. This thesis may shed some light on how to overcome the challenge of more with less.

The cavalry's role in the Valley Campaign may provide some insights that may prove valuable to today's military leaders. Particularly, the smaller size, mobility, and combined arms nature of Confederate cavalry forces in the Valley Campaign may be of particular interest to the U.S. Army of today and tomorrow. As the U.S. Army embraces its new mission of "Global Mobility," Jackson's highly mobile Army may provide some insights. In particular, was a highly mobile, combined arms cavalry force essential to the success of the mobile infantry army? Were cavalry forces available, and did they contribute to the success of the forces in the field? If Jackson's cavalry forces were not successful, then why were they not successful? If these forces were successful, was the use of combined arms a factor? Were cavalry operations integrated into the overall campaign plan so that they served as a force multiplier for the campaign?

Another area of value that may be of importance today involves leadership. What role did leadership play in the campaign of 1862? How did the leaders react to the demands of their civilian leaders? How did they go about their mission, with respect to reduced resources and particularly high expectations? What role did leadership play in the effectiveness of the cavalry?

Innovation and improvisation are other areas where lessons from the past find application in today's military challenges. What role did innovation and improvisation play in the use of cavalry in the Valley? Did the nature of the 1862 battlefield in the Valley necessitate a new and different way of using cavalry? If so, did the experiment run its full course and was that experiment successful?

The value of this thesis, in terms of its application for today's and tomorrow's military, is not limited to these areas. These are but a few of the parallels that one might draw from the past and apply to the future. As the thesis unfolds, the reader will more than likely find some other, potentially more useful, applications of the lessons learned from the study of Confederate cavalry operations in the Shenandoah Valley in 1862.

[1] Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 36.

[2] Throughout this thesis, any use of the word "Valley" will refer to the Shenandoah Valley unless otherwise stated.

[3] David G. Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1995), 29.

[4] Martin, 29.

[5] Tanner, 17.

[6] Tanner,17.

[7] Because the primary rivers in the Valley flow northward, the upper Valley is the southern portion of the Valley and the lower Valley is the northern portion.

[8] Taner, 95.

[9] Tanner, 96.

[10] Martin, 13.

[11] Tanner, 64.

[12] Martin, 12.

[13] Paddy Griffith, "Civil War Cavalry: Missed Opportunities*" MHQ: The Quarterly Journal of Military History* 1, no. 3 (spring 1989): 179.

[14] Griffith, 179.

[15] Louis Caldera, *A Statement on the Posture of the United States Army Fiscal Year 2000* (Washington, DC: Department of the Army, 1999), vii.

CHAPTER 2

AMERICAN CAVALRY EXPERIENCE

> Of the three arms—cavalry, infantry, and artillery—none must be
> despised. All are equally important.[1]

> Napoleon Bonaparte

Before beginning a concentrated study of cavalry employment in the Shenandoah Valley

in 1862, it is important to complete some foundational work by conducting a brief historical study

of the use of cavalry in American military operations. An accurate assessment of cavalry

operations in the Valley is not possible without first completing this review.

This chapter, consisting of three distinct parts, will provide the framework of this

historical study. Any review on the use of cavalry would be incomplete without first considering

the impact of the European experience, particularly of the Napoleonic period. Because the

American cavalry historical experience was different from that of Europe, a brief review of the

American experience is also necessary. The final element of this review will be a discussion of

the implications of the American historical experience on the future employment of cavalry

forces in the U.S. Civil War.

<u>European Cavalry Model</u>

Among many of his accomplishments, Frederick the Great evolved military tactics from a

primarily attritional based approach to an approach that exploited maneuver warfare. In his

maneuver warfare plan, Frederick's cavalry played a critical role. Frederick would typically use

his artillery to disrupt enemy defense, his infantry to hold the enemy line, and his cavalry to

sweep behind the enemy to attack the rear. The cornerstone of Frederick's great success was his

use of combined arms, which he used with devastating effect against his enemies.

The innovations of combined arms and maneuver warfare were not lost on Napoleon.

Cavalry was an invaluable part of his combined arms method of warfare. Napoleon's battles

typically followed the example of Frederick the Great. Napoleon would soften his opponent with artillery fires, fix it with infantry, and provide a cavalry shock attack, usually from the flank. Of the three elements on the battlefield, cavalry was the best arm, because of its exceptional maneuverability, to provide the shock attack and unravel the enemy's position. From there, cavalry was essential to carry out the subsequent pursuit.[2]

As one of Napoleon's staff officers, Baron de Jomini was closely familiar with Napoleon's tactics. From his vantage on the staff, Jomini formulated and validated the basis for many of his views concerning warfare and presented these views in his book, *The Art of War*.

A closer study of Jomini's views is important for several reasons. First, Jomini provides a Franco-centric view of warfare, a battle-proven method of warfighting. Second, for U.S. military officers, exposure to Jomini occurred before the U.S. Civil War through the coursework at West Point and the fact that U.S. Army regulations codified many of Jomini's principles[3]. As an expert in Napoleonic tactics, Jomini provides valuable insight into the European cavalry model. For these reasons, several of Jomini's views on the employment of cavalry will be presented as a method to fully explain the European cavalry model.

The size of Napoleon's cavalry forces, as a percentage of his total force, changed over time. In his early armies, Napoleon's cavalry forces represented a relatively small portion of his force. Over time, Napoleon was able to increase his cavalry force until it represented a zenith of about 20 to 25 percent of his total force.[4] When selecting the optimum amount of cavalry, Jomini chose a value between these extremes. "As a general rule, it may be stated that an army in an open country should contain cavalry to the amount of one-sixth its whole strength; in mountainous countries one-tenth will suffice."[5] This equates to a value no less than 10 to 16 percent of the army's strength, dependent on terrain.

Jomini identified several key roles for the employment of cavalry on the battlefield.

Cavalry can never defend a position without the support of infantry. Its chief duty is to open the way for gaining a victory, or render it complete by carrying off prisoners and

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trophies, pursuing the enemy, rapidly succoring a threatened point, overthrowing disordered infantry, covering retreats of infantry and artillery. An army deficient in cavalry rarely obtains a great victory, and finds its retreats extremely difficult.[6]

It is important to note that, in the defense, cavalry forces were extremely vulnerable and required a combined arms force for defense. This distinction occurred, in part, because of the type of weapons assigned to cavalry forces in Napoleonic times, typically sabers or lances, and the limited range of these weapons.

Jomini also emphasized the use of combined arms in the attack. He believed that the success of cavalry employment depended on the use of combined arms. Any cavalry attack had little chance of success if the commander did not also employ artillery and infantry at the cavalry's point of attack. In this attack, the cavalry's effectiveness increased when the commander applied the cavalry on the enemy's flank or from the enemy's rear. The one possible exception to this was the engagement of enemy artillery positions that were unsupported with other combat arms, infantry or cavalry. In this case, the cavalry could be sent by the most direct route to the enemy. The speed of the cavalry attack could overwhelm the enemy position without absorbing numerous volleys before contact because of the relatively slow rate of artillery fire.[7]

The essential tenets of the European cavalry model are these. Cavalry forces are most effective when employed in concert with other combat arms. Through a shock attack, cavalry forces can open a way for victory. Because of their speed and maneuverability, cavalry forces are the best "tool" for pursuing and destroying disorganized enemy forces. Cavalry's speed and maneuverability are equally important to succoring a threatened position. Cavalry forces are essential as a covering force for friendly infantry and artillery, whether as an advance or rear guard. A force in the retreat is particularly vulnerable without a cavalry covering force. The final essential tenet codifies the size of the cavalry force. On open ground, the European model dictates a cavalry force of 16 to 25 percent of the entire force.[8] Although students of military

history may draw many conclusions about the employment of cavalry forces on European battlefields, these principles are some of the most significant.

United States Cavalry Model

As will be highlighted in the following discussion, the historical use of cavalry in the United States was substantially different from that of Europe. It is not within the scope of this thesis to determine the validity of these differences; rather, this section will merely identify these differences.

Cavalry Forces in the Colonial Wars

Before the American Revolution, cavalry forces played no significant role in the wars of North America. The dense woodlands that comprised most of the battlefields of the French and Indian War were not conducive to cavalry operations. Additionally, the Eastern Indians of this war did not use horses in their military operations. Consequently, America did not develop a cavalry arm before the American Revolution.[9]

Cavalry Forces in the American Revolution

When the American Revolution began, neither side in the conflict had a cavalry arm. As was to become apparent as the war progressed, leaders on both sides began to see a need for a cavalry arm. The British were the first to introduce cavalry forces into the conflict. The 17th Dragoons, the cavalry unit employed by the British, was initially ineffective because many of their horses died during their transatlantic trip. They later combined with the 16th Dragoons and did good service with Banastre Tarleton in the southern theater. The Americans were slower to recognize the value of a cavalry force. Cavalry volunteers actually reported to General Washington as early as 1776, but Washington declined these forces. After being outmaneuvered by the British and defeated several times in New York throughout 1775 and 1776, the necessity for a cavalry arm became obvious to Congress, and it authorized four regiments of dragoons. These regiments consisted of six troops for a total force of 280 men per regiment. They were

armed with sabers and flintlock pistols. Several historians, including Charles Francis Adams, have argued that the American Revolution could have been shortened by years if cavalry forces had been introduced sooner and in larger numbers. Whether true on not, both antagonists eventually recognized the need for cavalry forces and introduced them into the conflict.[10]

The employment of American cavalry forces produced mixed results. The experiences in the Northern and Southern theaters were remarkably different. America employed its cavalry forces in greater numbers and with greater success in the Southern theater.

Led by such notable men as Henry "Light Horse" Lee, William Washington, and Francis "Swamp Fox" Marion, American cavalry forces significantly contributed to the American war effort in the South. In 1779, British Colonel Tarleton took his cavalry forces from New York to the South. The war in the South evolved into a cruel partisan war waged primarily by small marauding bands of irregular forces on both sides. Poor use of his cavalry force contributed to American General Gates' defeat at Camden. In addition, Tarleton's use of his own cavalry, to a large degree, also contributed to Gates' defeat. Nathaniel Green, who succeeded Gates in the South, effectively used cavalry forces to win several battles. At King's Mountain, dismounted cavalry forces provided the victory. Cavalry forces also contributed to the American victory at Cowpens. A cavalry force of 150 soldiers was committed against Tarleton's flank at Cowpens at the crucial moment of the battle and turned a potential American defeat into a rout of the British. Despite these few examples, the primary contribution of the cavalry was in its use for screening friendly forces and conducting raids against the enemy.[11]

The experience of cavalry employment was quite different in the Northern theater. Hampered by a lack of equipment and supplies, General George Washington generally used his 4th Dragoons as escorts and couriers. The Americans never employed their regular cavalry forces in any significant numbers in the North. It is notable that several irregular cavalry units emerged in the North. Captain Allan McLane's Rough Riders and the Troop of Light Horse of

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the City of Philadelphia served with distinction. Particularly in 1778 and 1779, McLane's unit effectively raided British supply trains providing the lion's share of Washington's supplies. The Troop of Light Horse of the City of Philadelphia performed screening and scouting duties for Washington at the battles of Trenton, Princeton, Brandywine, and Germantown and for Lafayette at Brandy Hill. The efforts of these and other irregular cavalry units won the praise of Washington and provided valuable assistance to his war effort.[12]

The divergence of American and European cavalry heritage can find its root in the American Revolution. Unlike Europe, the cavalry arm in America did not share equal footing with the infantry and artillery arms. Because cavalry was never introduced in significant numbers, cavalry roles and employment tactics were modified to suit the uniquely American experience. Cavalry employment in the American Revolution consisted primarily of raids, scouting enemy positions, and screening friendly forces. Cavalry forces, when used in battle, most often fought dismounted.

Cavalry Forces between the Revolution and the Mexican War

During the period between the American Revolution and the Mexican War, the United States cavalry existence was tenuous. Between 1781 and 1832, the cavalry was nearly nonexistent with the exception of brief periods of conflict. The fear of standing armies and the higher costs of cavalry forces, as compared to infantry forces, significantly contributed to this phenomenon. However, Americans successfully used cavalry forces against the British in the War of 1812 at the Battle of the Thames and the Creek Indians in 1814 at the Battle of Horseshoe Bend. After these successes, America again disbanded its cavalry arm in 1815 at the war's end.

As the U.S. continued its expansion westward, the plains Indians were challenging the security of the settlers. Unlike the experience of the previous wars in the East, the Indians of the West employed mounted guerilla tactics. This threat necessitated a new need for a mounted

force. A dragoon force was created for the Black Hawk War in 1832. Since that time, the cavalry has been a permanent part of the U.S. Army.[13]

From 1832 until the Mexican War, the cavalry saw service in the West, including the Louisiana Territory, and in Florida in the Seminole War. The 1st Dragoons, a force of about 750 men, was employed primarily in a constabulary role in the West.[14] They were used to explore the new territory and provide protection to settlers as the U.S. continued its westward expansion. The American government established the 2nd Dragoons in 1836, primarily for use in the Seminole War. The Second Seminole War was waged for over seven years, 1835-1842, and the cavalry was employed almost exclusively in a dismounted fashion, spending most of its time wading through the swamps of Florida. In October of 1841, the 2nd Dragoons was transferred to the West.[15]

Between the American Revolution and the Mexican War, two particularly important events transpired that had a powerful influence on cavalry operations. The first involved the way in which cavalry units were created. The second involved the development of cavalry tactics.

At the root of the American military heritage is a deep-seated distrust of large standing armies. More than any other combat arm, the creation of cavalry units more occurred at the outset of a conflict. After the conflict, the government usually disbanded those cavalry units created for the conflict. Serious debate exists on the success of this method of fielding armies. Regardless of whether one argues that such success was because of or in spite of such resourcing, the U.S. did prevail while using this method of fielding armies. The cavalry arm would not be eliminated after 1832, but the cavalry would be small and poorly resourced because of America's distrust of large standing armies and the comparatively higher cost of cavalry units vis-a-vis infantry units.

Jominian principles strongly influenced the development of American military tactics, including cavalry tactics, during this time. These principles were impressed upon the military

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leaders of the day through instruction at West Point and through written instruction manuals. The tactical manuals for each of the combat arms--infantry, artillery, and cavalry--borrowed heavily from the French manuals of the day. Although primarily drill manuals, these were the closest thing that existed to written theory. In 1841, the War Department authorized a manual for the mounted arm. This manual, *Cavalry Tactics*, was a three-volume translation of the French tactics and provided for close-order line tactics with a two-rank formation. Although armed with firearms, the primary effect of cavalry was the shock attack of cavalrymen armed with sabers. The primary emphasis of cavalry employment was the tactical offensive and the use of the saber.[16]

As they entered the Mexican War, American military leaders were prepared to conduct their first true test of their brand of Jominian warfare. For the cavalry, the government quickly assembled and added new cavalry units to the three existing cavalry regiments--1st and 2nd Dragoons and the Mounted Riflemen. The government created, by an Act of Congress, a third regiment of American cavalry, the Mounted Riflemen, early in 1846 for the specific purpose of guarding the Oregon Trail. This regiment, like the other two cavalry regiments, was committed to the war with Mexico where American's version of adapted French cavalry tactics would face its first true test.

Cavalry Forces in the Mexican War

The Mexican War was to have a profound impact on the later conduct of the Civil War. For good or ill, the military leaders of the Civil War consistently drew on their own experiences in the Mexican War when deciding how to conduct their operations. "All of the men who commanded a Confederate army in one or more of the major campaigns or battles of the Civil War--Albert Sidney Johnston, P.G.T. Beauregard, Joseph E. Johnston, Robert E. Lee, Braxton Bragg, John C. Pemberton, John Bell Hood, and Jubal Earl--or who commanded a corps in four or more major battles--James Longstreet, Thomas Jackson, William Hardee, Leonidas Polk, A.P.

Hill, and Richard S. Ewell--were West Point graduates and all but three (Hood, Polk, and Early) of these fourteen men served in the Mexican War."[17] What lessons did they learn about the cavalry?

At the start of the Mexican War, the U.S. had two regiments of dragoons and one regiment of mounted riflemen. For the war, Congress authorized a third regiment of dragoons. The dragoons carried musketoons, sabers, and horse pistols while the Mounted Rifles carried percussion rifles and Colt's pistols. In addition to these regiments, the government mustered several other volunteer cavalry regiments into service in Mexico. The two most prominent of these were the Missouri Mounted Volunteers and the Texas Rangers.[18]

Although American cavalry regiments carried different designations, dragoons or mounted riflemen, employment most often occurred in a dragoon fashion--dismounted. In Europe, the armies included a variety of various cavalry types for the battlefield, each with a particular role. In a dragoon unit, the soldier used his horse to provide operational mobility. Once at the proper place on the battlefield, the dragoon would dismount and conduct the fight on foot. America's cavalry tradition had evolved into one type of cavalry unit. American cavalry units were not "pure" dragoons, but they conducted the preponderance of their fighting on foot in a dragoon fashion.

Cavalry forces conducted a variety of tasks in the war. They fought as skirmishers, to cover infantry flanks, to serve as couriers, and to charge the enemy when his lines faltered. The biggest advantage of the cavalry was in its mobility. This capability was exploited in order to cover the large areas of responsibility and contributed to the dilution of the cavalry throughout both the Northern and Southern theaters of the war. However, most often these units fought dismounted in combat. The Mounted Riflemen played a prominent role, albeit dismounted, in General Scott's victory at Chapultepec Castle on the outskirts of Mexico City. Two successful charges were conducted in the war, one at Resaca de la Palma in May of 1846 and another one

against a Mexican battery at Churubusco in August of 1847. After the occupation of Mexico City, the volunteer cavalry units significantly contributed to the war effort by conducting an antiguerrilla campaign against mounted Mexican irregulars, which were harassing the American line of supply from Vera Cruz to Mexico City.[19]

Throughout the war, the Americans, whose cavalry force was already small in comparison to their opposing Mexican lancers, thinly spread their cavalry across the two theaters of operation. Except in a few instances, most of the Americans cavalry's contribution occurred while dismounted. Several small charges, one with less than twenty men, took place during the war. Although these charges themselves did not decide any battle, they did strengthen America's commitment to the mounted saber attack. While most cavalrymen decried carrying the saber prior to the war, the success and notoriety of the few charges that were executed in the war ensured the army's continued commitment to the saber in their cavalry tactics.[20]

The Mexican War played a significant role in building the foundation of cavalry operations for the Civil War. The leaders on both sides of the U.S. Civil War would draw upon their experiences in the Mexican War when developing their cavalry tactics and strategies. Again, victory supported the concept of a volunteer force. For cavalry operations, the leaders were able to employ the cavalry in a variety of missions. When necessary, mounted charges against infantry and artillery could be successful. However, the Mexican War did not earn the cavalry equal footing with the other combat arms. Was this the right view on the use of cavalry forces? James Merrill, Associate Professor of History at Whittier College and author of several histories, strongly denounced the way America used its cavalry in the Mexican War in his book, *Spurs to Glory*. "During the Mexican War, American Generals failed to exploit the full potential of the mounted arm. Junior officers in Mexico, who later took commanding positions in the Civil War, learned few positive lessons about cavalry."[21]

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Implications of the American Cavalry Experience

An understanding of the historical precedent of the American cavalry tradition is a critical first step in understanding the use of cavalry forces in the Civil War. War leaders, both civilian and military, would draw upon the lessons of history in the formulation of their tactical and strategic thinking. The American military drew several essential lessons, rightly or wrongly, from America's past experience with cavalry operations. American military leadership applied these lessons to Civil War operations. These lessons are rooted in the history previously described, but the Mexican War would have the strongest impact on the formation of American military thinking at the outset of the Civil War.

Cavalry Size

The first lesson of the American cavalry experience concerns the size of the peacetime cavalry force. American cavalry forces were smaller than their European counterparts for two primary reasons. First, throughout its history, America had been resistant to a large standing army. Second, the cavalry arm never achieved a position of equality with the other combat arms--infantry and artillery. For the cavalry, the extra cost, as compared with a unit of similar size in the infantry, made it even more difficult for the cavalry to reach parity with the other combat arms. The Mexican War, because of its successful result, again validated the acceptability of the American tradition of maintaining a small regular army in peacetime. In the end, the Mexican War did little to change America's feeling about a large standing army and little to change the Army's view about the role of the cavalry. At the end of the Mexican War, the American government disbanded the 3rd Dragoons.[22]

On the eve of the Civil War, the American Army was still small. Although slightly increased in the late 1850s because of the increased size of the American West, the American military remained relatively small. The increases raised the size of the U.S. Army to 15,000 and included four new regiments--two cavalry units and two infantry units.[23]

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Volunteer and Militia Force

The second lesson learned from the American cavalry experience was that volunteer and militia units could fill wartime needs. From the beginning of its history, America had relied heavily on volunteers and militia to meet its military needs. As the Civil War began, America would again fill its military needs with a call for volunteers. The experience of cavalry units in Mexico led Northern and Southern leaders to contrasting views concerning the value of cavalry units.

General Winfield Scott, the highest-ranking U.S. military officer at the start of the war, did not want to add any cavalry units to the army. His experience in the Mexican War led him to believe the importance of cavalry in the Civil War would be insignificant. In the Mexican War, three cavalry units--the 3rd Dragoons, the Texas Rangers, and the Missouri Mounted Volunteers, were added to the three already in existence at the outbreak of the Mexican War. The 3rd Dragoons, a regular army cavalry unit, was not fully fielded before the end of the Mexican War and was disbanded immediately following the war. The time and resources that were required to place a cavalry force in the field were greater than for infantry units. This reality was not lost on General Scott, and he decided "the expense of outfitting and training the horse units could not be justified."[24] As the North mobilized for war, volunteer cavalry units were turned away by Secretary of War Simon Cameron. Not until public and political pressure mounted did Lincoln overturn Scott and Cameron.[25]

By comparison, the Confederacy did not hesitate to fill its rolls with cavalry units; as was America's heritage, the Confederacy would initially meet its military needs with militia and volunteers. For the South, the experience of the Texas Rangers and the Missouri Mounted Volunteers in the Mexican War provided the model for mounted volunteer units. The fact that the South fully integrated its regular officers, that is those who had served in the U.S. Army prior to secession, into the Confederate Army structure, may have also played a significant role in the

South's view of cavalry units. In 1855, then U.S. Secretary of War Jefferson Davis carefully selected Southern officers for the 2nd U.S. Cavalry. "Of the twenty-five who held commissions, seventeen were Southerners, twelve of whom were later to wear general's stars in the Confederate armies."[26]

The Union kept its regular units together after the war began. The South, on the other hand, dispersed those with military experience across the emerging Confederate Army. The Confederate approach, given the cavalry background of many of these officers, likely contributed to the South's views on cavalry volunteers. This use of volunteers as a method of force building had served the Americans so far and the South used it again at the outset of the Civil War.

Cavalry Logistics and Training

The third lesson learned from the American cavalry experience concerns the unique nature of cavalry logistics and training. The North and South would address the nature of cavalry logistics and training in a different fashion, but each approach followed the historical precedent. In the beginning, the view of the North was to avoid cavalry units altogether. This occurred for two primary reasons. First, this would reduce the time necessary to place units in the field. Second, a short war could not justify the $300,000 it would cost to field a 1,200-man cavalry regiment.[27] The response of General Scott followed the precedent of the Mexican War and on the generally held belief that the Civil War would be of short duration.

When, in response to political pressure, the U.S. was forced to accept volunteer cavalry units, the U.S. army was ill-prepared to field them. James Merrill, in *Spurs to Glory: The Story of the United States Cavalry*, describes the nature of Union volunteer cavalry units this way:

> Northern cities teemed with Hussars, Blues, Light Horse, Mounted Rifles--for the most part uninstructed and unmounted, but bursting with enthusiasm. As enlistments increased, Washington was confronted with the problem of equipping the newly created horse regiments. No aspect of building the Union cavalry was more chaotic. Horse soldiers lacked everything from bullets to suspenders. Through haste, carelessness, or criminal collusion, the government blindly accepted almost every offer and paid almost any price for commodities regardless of quality or quantity.[28]

For the North, the need for volunteers, of any kind, was more important than the cost or quality of the volunteers. The Union was, after Lincoln's insistence, willing and able to expend the time and resources necessary to place these volunteer cavalry units in the field.

The South's approach to the logistical and training requirements of their cavalry units was different. Southern leadership was equally aware of the time and cost required for fielding a cavalry unit. The Southern response was to reduce the effect of the two previously mentioned negatives. The Southern cavalry soldier would have to provide his own horse and the additional logistical needs of a cavalry soldier. This would reduce the time necessary to place the Confederate cavalryman in the field because he would already be trained and reduce the logistical needs by having the soldier provide those himself. As the early Civil War confrontations would bear out, the South was in a better position to exploit this approach than the North.

> In a position to secure horses immediately, its population accustomed to riding, the South could field a mass of expert horseman. . . . Skilled in the use of firearms, Southerners shot expertly from the saddle and possessed an intimate knowledge of their country's topography.[29]

This approach was also validated in the Mexican War as well. In that war, the Texas Rangers and Missouri Volunteers served with distinction. Unlike the 3rd Dragoons, a regular U.S. unit authorized by Congress for the Mexican War, these volunteer units were able to quickly reach the field and significantly contributed to the U.S. effort.

The Missouri Volunteers, commanded by Colonel Alexander Doniphan, was highly successful despite their unconventional approach. James Merrill described the situation of Doniphan's command this way.

"They broke every rule of the game--and were completely successful. During the entire year of their enlistment, these volunteers, starting at Fort Leavenworth, covered 3,600 miles by land and 2,000 by water before returning to Missouri. They had no quartermaster, no paymaster, no commissary, no uniforms, no tents, and no discipline."[30]   If the Union approach to cavalry

logistics is one extreme and Doniphan's approach is the opposite extreme, the Southern approach to cavalry operations would fall somewhere between the two.

Cavalry Tactics

The fourth, and final, lesson of the American cavalry experience concerns cavalry tactics. The American historical experience was unique and varied greatly from that of Europe. American cavalry tactics were very similar in doctrine to the European model, from which they borrowed heavily, but absolutely different in practice. In order to understand American views on cavalry employment, it is important to understand this contradiction.

For many reasons, the American cavalry never reached the standard for cavalry as expressed by Napoleon. Not only were the armies fighting in North America smaller than their European counterparts, but also cavalry forces constituted a significantly smaller percentage of the armies as a whole. In America, the cavalry had evolved into a single function and were not as specialized as their European counterparts. The Europeans had dragoons, chasseurs, lancers, hussars, to name a few. Each type of cavalry had a different set of roles and functions on the battlefield. American cavalry typically favored the dragoon variety and most often fought dismounted. American cavalry units conducted many of the same missions as they did in Europe, but the primary mission of cavalry, the shock attack, occurred less often in the American cavalry. When done, American mounted charges were on a substantially smaller scale than those in Europe.

America's composition of cavalry forces is consistent with the American experience. With the exception of a few battles during the American Revolution and the Mexican War, cavalry forces typically played a constabulary role in periods of peace and as dismounted cavalry in clashes of war, primarily against Indians. The primary advantage of a cavalry force was in its mobility. This advantage was particularly important for covering the expansive frontier of the American West. With such a small standing army, there just was not a need for any of the other

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varieties of cavalry. America's use of its cavalry force in the Mexican War capitalized on the cavalry's mobility in order to cover the vast areas of the two Mexican War theaters of operation.[31]

America's cavalry practice and cavalry doctrine did not mesh. Practical experience, both on the Western frontier and on the battlefields of the Mexican War, had taught the leadership the virtues of dismounted action. The official American works on tactics preached the orthodox European doctrine with an emphasis on the shock attack. The first tactical manual for the U.S. cavalry was written in 1841. This manual, *Cavalry Tactics*, was a three-volume translation of the French tactics that emphasized close-order line tactics and a shock attack with sabers.[32] The 1841 tactics remained unchanged until the start of the Civil War. In 1861, General McClellan published a cavalry manual that directed that "cavalry units should attack in line formations and that the cavalry's strength was in 'spurs and saber.'"[33] Also published in 1861, the Union's new *Cavalry Tactics*, written by Phillip St. George Cooke, was "borrowed and paraphrased from the 1841 tactics. Cooke, however, made a fundamental change in the tactics, the adoption of a single rank formation."[34] The Confederates' re-wrote the 1841 tactics as well. Their version, *A Revised System of Cavalry Tactics*, was written by Joseph Wheeler, was similar to Cooke's, and recommended the single-line formation. The common theme of each of these tactical manuals was that they codified, in a modified form, the European model of cavalry employment. In written form, cavalry tactics called for shock attack conducted through massed charges by cavalry in a single line of four or more squadrons armed with sabers. They each supported the position that "the charge is the decisive action of cavalry."[35]

Despite written guidance to the contrary, cavalry units rarely employed in the fashion mandated by the doctrine of the day. In application, there was a major divergence between doctrine and practice. General McClellan provides a good example of this disconnect. As a military observer of the Crimean War, McClellan had seen firsthand the European employment of cavalry. The European model is evident in his cavalry instruction manual. However, in practice,

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McClellan was quick to depart from doctrine. "He parceled out his horse regiments among his infantry corps, division, and brigade commanders. The smallest infantry organization had its company of troopers."[36] The Union did not begin to consolidate its cavalry until 1863. By comparison, the Confederates were quicker to consolidate their cavalry, but they were no quicker to employ their cavalry in the massed charges that formed the core of their doctrine. Cavalry units were going to be used in a variety of roles in the Civil War; the doctrinally directed regimental cavalry charge being the least often used. Simply, the American cavalry doctrine was contrary to the American cavalry history. The leadership of both armies would rely on practical experiences, including those of the Mexican War and operations on the Western plains, when developing cavalry operations for their campaigns.

The disconnect between doctrine and practice existed for several reasons. First, the importance of and adherence to doctrine had yet to reach the level of compliance experienced in the U.S. Army today. Second, many leaders stepped into the Civil War with the wrong lessons learned from history. Third, the scope and nature of the Civil War was profoundly different from anything before experienced in American military history.

Conclusion

In order to understand the role of cavalry operations in the Valley, it is important to understand the foundation upon which those operations would be based. The European model is an inappropriate measure to use when examining the use of cavalry in the Civil War. Careful consideration of America's historical use of its cavalry provides a better framework. In particular, the lessons learned from America's historical experience provide a clearer picture of the starting point of cavalry operations in the American Civil War. The school of historical thought, championed by Paddy Griffith and others, which ridicules the role of the cavalry in the American Civil War is based on the European model of cavalry--a paradigm that is not appropriate. An analysis of cavalry forces contributions to the Civil War will demand a better

measure than a side-by-side comparison with cavalry operations in past European wars. This chapter provided the unique American perspective and the impact of that perspective on the foundation of American cavalry.

Using a building block approach to this subject, chapter 3 will build on this foundation by addressing some additional key foundational issues. However, these issues will be more focused on Confederate cavalry operations in the Valley. Thoughtful review is necessary on the key leaders that influenced Confederate cavalry operations in the Valley, on Confederate cavalry organization, on Confederate concepts of cavalry logistics, and finally, on basic cavalry tactics. In combination with the review provided in this chapter, chapter 3 will assist in the development of a thorough, clear, and accurate assessment of Confederate cavalry operations in the Valley.

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[1] This is a military maxim of Napoleon from a selection of Napoleon's written and spoken words translated by Christopher Herold. Christopher Herold, *Mind of Napoleon: A Selection from his Written and Spoken Words* (New York: Columbia University Press, 1955), 219.

[2] Baron de Jomini, *The Art of War*, trans. Captain G. H. Mendell and Lieutenant W. P. Craighill (Philadelphia, PA: J. B. Lippincott & Co., 1862; reprint, Westport, CT: Greenwood Press, 1979), 278.

[3] Grady McWhiney and Perry D. Jamieson, *Attack and Die* (Tuscaloosa, AL: University of Alabama Press, 1982), 41. The authors point out that although *Jomini's Summary of the Art of War* was not used as a textbook at West Point until 1859, Jominian principles were taught by Dennis Mahan in a mandatory Senior class course. Jomini's principles were included in his own influential work, *An Elementary Treatise on Advance Guard, Out-Post, and Detachment Service of Troops, and the Manner of Posting and Handling Them in the Presence of the Enemy*, and included in the Army regulations of the day.

[4] Paddy Griffith, *Battle Tactics of the Civil War* (New Haven, CT: Yale University Press, 1989), 181.

[5] Jomini, 304.

[6] Jomini, 305.

[7] Jomini, 305.

[8] Historical percentages of cavalry forces within Napoleon's armies varied. Griffith, in *Battle Tactics of the Civil War*, identified this value typically in the 20 to 25 percent range.

Jomini, in *The Art of War*, suggested no less than 10 percent in mountainous terrain and no less than 16 percent in open terrain.

[9] John K. Herr and Edward S. Wallace, *The Story of the U.S. Cavalry: 1775-1942* (Boston: Little, Brown & Company, 1953), 3.

[10] Herr and Wallace, 4-6.

[11] Herr and Wallace, 15-18.

[12] Herr and Wallace, 11.

[13] Albert G. Brackett, *History of the United States Cavalry* (New York: Greenwood Press, 1968), 25-33.

[14] Herr and Wallace, 26.

[15] Albert G. Brackett, *History of the United States Cavalry* (New York: Greenwood Press, 1865), 49.

[16] McWhiney and Jamieson, 32-38. Winfield Scott's three-volume *Infantry Tactics* followed French tactical theory and stressed close-order formations. Although published 6 times between 1835 and 1848, it was never rewritten. Captain Robert Anderson translated the French artillery manual in 1839, *Instruction for Field Artillery, Horse and Foot*. With only a few changes, the War Department's drill manual for artillery, *Instruction for Field Artillery*, was published in 1845. *Cavalry Tactics*, published in 1841, was a three-volume translation of French tactics.

[17] McWhiney and Jamieson, 160.

[18] Herr and Wallace, 49-57.

[19] James M. Merrill, *Spurs to Glory: The Story of the United States Cavalry* (New York: Rand McNally & Co., 1966), 50-59.

[20] McWhiney and Jamieson, 63.

[21] Merrill, 75.

[22] Brackett, 123.

[23] Merrill, 77. Paddy Griffith puts the number at 16,000 (Griffith, 30).

[24] Merrill, 123.

[25] Merrill, 123.

[26] Merrill, 123.

[27] Merrill, 123.

[28] Merrill, 124.

[29] Merrill, 122.

[30] Herr and Wallace, 50.

[31] Merrill, 123.

[32] McWhiney and Jamieson, 38.

[33] George B. McClellan, *Regulations and Instructions for the Field Service of the U.S. Cavalry in Time of War* (Philadelphia: U.S. Army, 1861), 13.

[34] McWhiney and Jamieson, 65.

[35] Phillip St. George Cooke. *Cavalry Tactics or Regulations for the Instruction, Formations, and Movements of the Cavalry of the Army and Volunteers of the United States* (Washington, DC: Department of the Army, 1861), 60.

[36] Merrill, 130.

CHAPTER 3

CONFEDERATE CAVALRY IN THE VALLEY

The contest into which we enter is one full of peril, but there is a spirit abroad in
Virginia which cannot be crushed until the life of the last man is trampled out.[1]

Former President John Tyler, *Civil War Quotations*

President Tyler was aware of the bitter struggle between state and federal rights that

defined much of the national discourse of the nineteenth century. Following a proud tradition of

former Virginia Statesmen, President John Tyler represented the state of Virginia in the highest

national office of the land, serving as the 10th President of the U.S. from 1841-1845. Although

entering the final year of his life when he made this statement in April of 1861, Tyler understood

the strength and depth of state loyalty. Like many other great men, Tyler was a Virginian first;

and, as Tyler indicated, this loyalty would be difficult to stamp out. Tyler prophetically

described the tenacity that would characterize the deadly struggle upon which the nation was

initiating in April of 1861, an event now known as the Southern War of Independence.

Introduction

The effectiveness of a military unit depends upon a number of factors. Some of the more

important of these factors are leadership, organization, logistics, and tactics. In chapter 2, the

central theme was the implications of the American cavalry experience and their influence on the

development of cavalry operations in America. Although these implications provide a valuable

insight into the influence of historical events on American cavalry development, a more focused

review of the foundational factors of leadership, organization, logistics, and tactics is necessary.

As an advocated position or policy, doctrine transcends each of these factors. Doctrine

writers develop doctrine for many aspects of military operations, including these key factors.

This doctrine may be isolated to one area of military operations or it may advocate a position that

integrates several different areas. Not necessarily, but usually written, doctrine provides the

recommended approach to some aspect of military operations. Because doctrine integrates, in some fashion, lessons learned from past experience, it is especially susceptible to a backward looking focus. Overlooking this characteristic, military doctrine is likely to advocate an approach that refights the last war, not one that advocates winning a future one. As pointed out in chapter 2, particular disconnects were apparent in American cavalry doctrine on the eve of the Civil War. America's historical experience with cavalry brought with it a number of implications for the future employment of cavalry forces in the Civil War.

Chapter 3 will build on the general discussion of cavalry operations conducted in chapter 2 and focus more specifically on the Confederate cavalry at the beginning of the Valley Campaign. As building blocks of a military unit's capability, this chapter will concentrate on the areas of leadership, organization, logistics, and tactics. To limit the scope of this discussion, where possible, the focus is on the Confederate cavalry and their operations in the Valley Campaign.

<div align="center">Leadership</div>

The importance of leadership, as an element of a military unit's capability, is paramount. During the Valley Campaign, several leaders significantly influenced cavalry operations. Because of his preeminent position as commander of the Valley District, Major General Thomas J. "Stonewall" Jackson played a dominant role in Valley cavalry operations. Subordinate cavalry commanders in the Valley are equally important to this leadership discussion. Among these, Colonel Turner Ashby is the central figure. For most of the campaign, nearly all cavalry forces in the Valley were under Ashby's command. Although exerting less influence, Brigadier George H. "Maryland" Steuart also affected cavalry operations in the Valley.[2] Maryland Steuart rode into the Valley as a subordinate commander of Major General Richard S. Ewell's army--which included a force of about 8,000--at the end of April. Ewell's army was added to Jackson's command and included a brigade composed of the 2nd and 6th Virginia Cavalry Regiments

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under the command of Steuart. Because of their particular leadership positions, Jackson, Ashby, and Steuart directly influenced cavalry operations in the Valley.

Major General Thomas J. Stonewall Jackson

Stonewall Jackson was born on 21 January 1824 in the western Virginia town of Clarksburg. Although his father was not as successful as other ancestors had been, Thomas was born into a family with a distinguished heritage. His uncle and grandfather had been U.S. congressmen. His grandfather and great grandfather had served with American forces during the American Revolution. Thomas' father died when he was three, and before he was six Thomas went to live with an uncle. Under his uncle's care, Jackson thrived. He received a rudimentary education and assisted with the management of the estate, "although age and the constant presence of uncles prevented Jackson from exercising any leadership role in the management of the estate."[3] Before he was twenty-one, Jackson had held several jobs, including Lewis County constable.[4]

Through his own efforts, Jackson earned an appointment to West Point. Upon learning that a cadet from his district had resigned, Jackson sought the support of his influential friends and relatives in order to secure a meeting with his Congressman, Samuel Hays. Hays was concerned about Jackson's lack of formal education, but arranged an interview with the Secretary of War. Jackson impressed the Secretary and secured an appointment to the Academy.[5]

Jackson's career at West Point was noteworthy. Jackson found the academics extremely challenging, and poor-academic performance nearly resulted in his expulsion after the first year. However, through sheer force of will and unwavering determination, Jackson overcame his academic deficiency. By graduation, Jackson had risen to seventeenth in his class of fifty-nine. Jackson's classmates said that if the school had lasted another year then Jackson would have been at the top. Jackson's class of 1846 included other soon to be distinguished Civil War

general officers including Union generals George B. McClellan, John G. Foster, Jesse L. Reno, Confederate generals A. P. Hill, George E. Pickett, William D. Smith, and Dabney H. Maury.[6]

Immediately after graduation, Jackson went to the Mexican War as an artilleryman. Jackson was highly successful, twice promoted for gallantry and bravery. He earned praise from his superiors, including General Winfield Scott. During the war, Jackson reached the rank of brevet major.[7]

A few years after the war, Jackson left the army to take a teaching position at the Virginia Military Institute (VMI). While at VMI, Jackson acquired a reputation for what some called his "oddities." By way of illustration, some are presented here. He would sit still or stare blankly for hours. His teaching style was nothing more than rote recitation of memorized text. Any interruption or question would result in him starting the entire process over from the beginning. He did not drink alcohol or coffee with sugar. When asked why, in both cases he said it was because he liked them too much.[8]

Jackson had several personal character traits that are worth mentioning. First, he was a very religious person. Although he did not accept organized religion until his tour in Mexico, from that point on it was a central aspect of his character. When possible, Jackson would avoid military actions on Sundays. He organized religious services for his troops and had an extensive chaplaincy in his army. Both his personal and professional writings reflect his reverence to God.

The second significant personal character trait of Jackson was his sense of duty and self-discipline. Jackson operated on a high degree of self-discipline. His success at West Point is a testimony to this. His actions in the Mexican War, under enemy fire, are also testimonies of his self-discipline and sense of duty.

Jackson's third significant personal character trait was perfectionism, in terms of duty and discipline. Like of himself, Jackson expected the highest standards of his men. It was the discipline Jackson enforced on his men before the battle of First Manassas that led to their

success on the battlefield. Jackson earned his nickname, Stonewall, for the discipline of his men on the battlefield. Failure to meet Jackson's expectation of discipline resulted in swift and sure punishment.

Jackson was not hesitant to enforce harsh discipline on his men, particularly on his subordinate commanders. Jackson's removal of Brigadier General Richard Brooke Garnett from command of the Stonewall Brigade after the Battle of Kernstown is an excellent example. Jackson removed Garnett from command and commenced a court-martial for Garnett's disobedience of orders--Jackson alleged that Garnett's withdrawal of his brigade during the battle was unauthorized. In this case, Garnett had ordered the withdrawal of the Stonewall Brigade after the exhaustion of all of its ammunition. This event and Jackson's reaction to it had a profound effect on his Valley Army, its leaders and soldiers. When, six months later, in the battle of Second Manassas, the Stonewall Brigade ran low on ammunition, the call for "fixed bayonets" was made with no thought of withdrawal. In this case, his men had codified Jackson's sense of duty and intended on carrying-out that duty, regardless of the personal cost. Jackson's personal faith, self-discipline and duty, and his demand for perfection would play a significant role throughout the Valley Campaign.

In addition to Jackson's history and personality, an understanding of this leader is incomplete without some consideration of his military principles. Several elements formed the basis of Jackson's Valley Campaign. These included an aggressive strategy that favored the offense, concentration of his force to achieve local superiority, passion for secrecy, and keen use of terrain to exploit each of the above elements.

Jackson was an aggressive commander and constantly considered opportunities to take up the offensive. No less than seven times during his campaign Jackson asked superiors for additional forces so that he could go on the offensive. The first of these requests came the day after he assumed command in 1861. Of the major battles of the campaign, six of the seven

battles found Jackson on the offense. However, Jackson also understood the value of a good defense. The Battle of Cross Keys was a defensive battle. In addition, Jackson's forces conducted two superbly executed fighting withdrawals up the Valley.[9]

When taking the offense, Jackson was careful to consider the location, size, and composition of the various armies arrayed against him. Through skillful use of terrain and maneuver, Jackson was able to achieve local superiority in numbers in each of his battles with the exception of one, Kernstown. Jackson's selection of Jedediah Hotchkiss as his cartographer and staff member was instrumental in Jackson's ability to exploit the use of terrain and position his own forces in a position of advantage over his enemy. Jackson's perfectionist nature and discipline allowed his forces to outmaneuver his opponents to place his own army in an advantage of position, composition, or numbers--often all three.

Secrecy was another principle woven into Jackson's military thinking. "Mystery-- mystery is the secret of success."[10] Using secrecy, he was often able to surprise and confuse his enemies. In order to achieve surprise, Jackson was willing to keep even his highest-ranking subordinates uninformed of his intentions. This led many to call him an "old fool" or "mad Jack." Often it was the case that Jackson's subordinates did not come to understand and appreciate his plan until after a plan's execution. Toward the end of the campaign, Major General Ewell, who had also fallen prey to Jackson's secretive ways, made this statement about Jackson's secretive ways: "Old Jackson is no fool; he knows how to keep his counsel, and does curious things; but he has method to his madness; he has disappointed me entirely."[11]

Jackson was a student of Napoleon and Jackson's military actions often reflected that study. In his haversack, Jackson carried three books--the Bible, a dictionary, and a copy of Napoleon's maxims. The book of Napoleon's maxims was a gift from Jeb Stuart. Even his enemies recognized his Napoleonic flare. The following is a quote from the *New York Herald* after Jackson's death: "It is agreed on all hands that Jackson was the most brilliant rebel general

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developed by the war. From his coolness and sagacity, rapid movements and stubbornness in the fight, and his invariable good fortune, he resembled Napoleon in his early career."[12]

As for the cavalry, Jackson used them in a variety of ways throughout the campaign. In battle, Jackson believed the role of the cavalry followed one simple rule. "The only true rule for cavalry is to follow as long as the enemy retreats."[13] As the campaign progressed, it becomes clear that if Jackson had a weakness, it was in his ability to fully understand the conditions under which his cavalry operated. Whereas men could be motivated to endure hardship through intellectual constructs, such as patriotism and the higher good, cavalrymen, whose horses were not so motivated, had difficulty achieving the same degree of sacrifice in the execution of their duty.

As commander of the Valley District, Major General Jackson's influence on the effectiveness of cavalry operations is obvious. Like all leaders, Jackson's personal character formed the nucleus of his leadership style. Using his past experience and military education, Jackson wove into his Valley Campaign a set of military principles that defined the nature of that campaign.

<center>Brigadier General Turner Ashby</center>

In terms of leadership and its influence on cavalry operations in the Valley, second to Jackson's leadership was the leadership provided by Turner Ashby. As the primary cavalry leader in the campaign, Ashby played a fundamental role

The family of Turner Ashby, having arrived in Virginia in 1635, held deep-seated roots in Virginia by the 1860s. Throughout the Ashby family's history, they had answered the call to military service. Four generations of Turner Ashby's ancestors held military commissions and fought in the colonial wars, the American Revolution, and the War of 1812. It is little surprise, given this history, that when Virginia called her sons to service again in 1861, like his ancestors, Turner Ashby answered the call.[14]

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Turner Ashby was born in Fauquier County, Virginia, in 1828. He was the third of six children born to Colonel Turner and Dorothea Ashby. Colonel Ashby, Turner Ashby's father, served in the War of 1812.[15]

Young Ashby's formal education was minimal. Initially, he was educated at home by a professional tutor. He later attended a local private school. He learned the basics of a good education. "A biographer, and kinsman, said that Turner Ashby's education was the usual one received by boys of the locality who did not go to college."[16]

Despite his lack of formal education, Turner Ashby was a well-respected member of his community. After his father's death when Turner was the age of six, Turner's mother had ensured that Turner was raised as a Virginian gentleman. He was a successful businessman and did well for himself in his mercantile business. His position and standing in the community propelled him into politics where he ran for the Virginia Legislature. As a Whig in a predominately Democratic district, he was defeated. Despite his strong family heritage, business successes, and political involvement, Turner was most-well known for his skills with a horse. Horsemanship was one of the dominating aspects of his informal education.[17]

Like many Southern states in the 1860s, Virginia had a strong equestrian heritage. It was the custom of Virginians to routinely conduct tournaments, hurdle races, and fox chases. It was in these competitions that Turner's skill on horseback was developed. Even before he began competing in these events, Turner's reputation with horses was building. Several quotes by boyhood friends serve to exemplify Turner's superior skill. "Whenever a colt was found too wild and viscous to be ridden by anyone else in the neighborhood, it was his pleasure to mount and tame him."[18] As he got older, Turner consistently won these contests of skill and was recognized as the "most distinguished of his associates. . . . with a dash and fire few young men have ever possessed . . . for was seldom that he failed to carry off the first honors. . . . His superb management of his horse, his daring feats, and his grace were the marvel of his day."[19]

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Although Turner's prowess on horseback was recognized in Virginia before the war, his

horsemanship in the war earned him a reputation and respect that transcended his region of

Virginia.[20]

Although he had held no formal military position prior to the war, Turner Ashby, through

his own initiative, had previously formed and led a mounted paramilitary unit for service in

Virginia. This unit began its operations in 1855 in response to the unruly behavior of foreign

laborers working on the Manassas Gap Railroad. Even after the work was completed, Ashby's

command continued to serve and grew in numbers. In response to John Brown's raid at Harpers

Ferry, Ashby, on the same day of the raid, assembled his men and took his command to the town.

He presented his forces to the commanding officer. There his men conducted patrols and

established outposts along the northern Virginia border. Ashby's efforts left an impression. One

officer remarked on Ashby's duty at Harpers Ferry this way: "Among the dashing cavaliers who

responded to the call of arms, Turner Ashby was foremost. . . . His knightly mien and superb

horsemanship attracted notice, and excited the admiration of all, while his calm demeanor and

gentlemanly manners quite won their hearts."[21] Although his duties at Harpers Ferry were

relatively short, Ashby established a good relationship with a unique group of future Confederate

leaders that included Robert Lee, Thomas Jackson, and James Stuart.[22]

Included in his informal military education, several other elements deserve special

mention. One of these elements is Turner's style of military leadership. Part of Ashby's

leadership training was conducted through the study of the written words of Turner's father,

Colonel Ashby. The diary of Colonel Ashby, written during the War of 1812, was a constant

companion of Ashby's from the time he was first able to read. His father's character and views

were carefully cultivated in his son through these words. From this example, Ashby developed a

style of leadership that was probably more similar to the modern army's perspective of direct

leadership, particularly in his approach to the respect of individual soldiers, than it was to the

dominant disciplinarian approach common to the military of his day. Turner Ashby would treat all of the men under his command with respect and empathy to each individual condition. This style of leadership would garner him the unwavering devotion of his men and, at times, calls for increased discipline of his troops from his commanders.[23]

The final element about Ashby considered here is his character. Central tenets of Ashby's character were his sense of duty, his fearlessness and courage, and his selflessness. James Avirett, in his book *Ashby and his Compeers*, provides numerous examples that support the nature of Ashby's character, as described above. Captain Avirett, as a captain on Ashby's staff, served with Ashby throughout the Valley Campaign. Because Avirett rode with Ashby, it is a sound source of information for assessing Ashby's character. One example from Avirett's book exemplifies this assessment and is illustrative of Ashby's sense of duty. Although patrolling near his home, Ashby never returned home during the war to take care of personal affairs. "Many would have availed themselves of the opportunity, when so near home, to stop and look after private affairs, but not Colonel Ashby. Never from the day he entered the service was he furloughed or absent from his post. A soldier neither by profession or choice, he was bound to the service of his country by the sternest sense of duty, and never did allow himself to be betrayed into the slightest neglect of it."[24]

Ashby had a reputation of dauntless courage that is apparent in all accounts of his actions in the Valley. Whenever there was enemy fire, Ashby was out in front. In the battle of Kernstown, Preston Chew recounted, " I have always believed his audacity saved Jackson's army from total destruction because Ashby's boldness deceived the Federals as to the size of his cavalry."[25] Avirett described Ashby's action in this battle this way: "The rapid and skillful maneuvering of his squadrons and battery elicited the warmest admiration, whilst his reckless exposure of life and wonderful escape from death, was the theme around the camp fires for a long time afterward."[26] As a reference to Ashby's true character, Avirett's book is an excellent

source and supports the general conclusions presented here concerning Ashby's sense of duty, selflessness, and courage. When Ashby was subsequently killed toward the end of the campaign, Jackson provided an assessment of Ashby that also supported the character assessment presented here. "His [Ashby's] daring was proverbial; his powers of endurance almost incredible; his tone of character heroic."[27]

Any discussion of cavalry operations in the Valley in 1862 must carefully consider the contributions of Turner Ashby. Ashby's cavalry regiment, the 7th Virginia Cavalry Regiment, formed the nucleus of cavalry in the Valley. Brigadier General Turner Ashby would capitalize on his informal education during the Valley Campaign; his horsemanship, leadership style, and individual character each contributed to the results of his cavalry regiment.

Brigadier General George H. Maryland Steuart

Brigadier General Steuart influenced cavalry operations in the Valley Campaign through his control of the 2nd and 6th Virginia cavalry. In March of 1862, Steuart was promoted to brigadier general and given command of four Virginia regiments and his own 1st Maryland Infantry regiment. The 2nd and 6th Virginia Cavalry Regiments were designated as Brigadier General Ewell's cavalry brigade while operating with Jackson in the Valley Campaign. These two cavalry regiments represented two of Steuart's four Virginia regiments, and he was effectively Ewell's cavalry leader. For the period that Ewell was operating with Jackson in the Valley, May and June of 1862, Steuart directly influenced cavalry operations through his control of Ewell's cavalry.[28]

Although he joined the Confederate Army as an infantryman in the 1st Maryland Infantry Regiment, Steuart had previously served in the U.S. Cavalry. After graduating from West Point in the class of 1848, he served on the frontier with the 2nd Dragoons. He did not distinguish himself in service in the West or while at West Point, where he graduated next to last.[29]

As a native of Maryland, Steuart returned home after resigning his commission in the U.S. Army in 1861. Before joining the Confederate Army, he tried in vain to bring Maryland into the Confederacy. Unsuccessful in his attempt, he joined the Confederacy as a captain of cavalry in the regular army. During the course of the war, the Confederacy would try unsuccessfully several times to form a Maryland Brigade under Steuart's command. For a variety of reasons, these attempts were unsuccessful. The biggest inhibitor to such a formation was the unwillingness of other units to transfer their native Marylanders.

In contrast to Ashby, Steuart was a disciplinarian in the 1860s sense. As the commander of the 1st Maryland, he had a reputation for strict discipline. While in command of the regiment, he drilled his men hard--generally six hours a day. "The regiment soon had the reputation of being the best drilled in General Joe Johnston's army; and the men, proud of this, well knew that they owed it to Colonel Steuart."[30] As a form of punishment, he would tie soldiers by their thumbs to a cross-pole in the center of the camp. Documenting this form of discipline in his journal in the summer of 1861, Randolph McKim, a private in the 1st Maryland, confirmed that is was not uncommon to see two or three soldier's punished in this manner in Steuart's camp. As a further illustration of his strict disciplinary standards, McKim also relates that Steuart had a habit of testing his men on guard duty by rushing them on foot or horse.[31]

Maryland Steuart would contribute to the Valley Campaign in a variety of ways. His men routinely went into battle as the lead brigade. The "Maryland Line," as Jackson would call it, held a well-respected position in the Valley Army. This respect, in no small part, grew from the unit's discipline and success in battle. That reputation is due in large part to the importance Steuart placed on rules, regulations, and discipline.

Cavalry Organization

In addition to leadership, organization is also significant to a military unit's effectiveness. The organization of Confederate forces, including cavalry, proved to be a major

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element in Jackson's Valley Campaign of 1862. Throughout the campaign, organizational factors continued to affect the Valley Army.

After voting to secede from the Union on 17 April 1861, Virginia Governor John Letcher immediately called on militia companies throughout the Valley to mobilize and then move to occupy Harpers Ferry. As was the case for most of the South, Confederate forces necessary for the defense of the Valley were thrown together from different sources, including both volunteer and militia units, and a variety of types--infantry, artillery, and cavalry. Included among those units that answered the call was Ashby's "Mountain Rangers."

Colonel Angus W. McDonald formed the 7th Virginia Cavalry Regiment in June of 1861. Ashby's Mounted Rangers was the first company to join the new regiment and constituted Company A of the 7th Virginia.[32] The regiment was fully formed by the end of June. Ashby's appointments as a lieutenant colonel and second in command of the regiment were approved by the War Department in that same month.

When Major General Jackson took command of the Shenandoah District of Virginia in November of 1861, Ashby was acting as commander of the 7th Virginia even though he was still a lieutenant colonel. The original commander of the 7th Virginia, Colonel McDonald, retired in early November.

Two issues are particularly important to the organization of cavalry forces in the Valley during the Valley Campaign. The first involves the effect of the drawing to a close of the first year of the war. The first issue is important because the end of the first year's enlistment meant that the Confederacy faced the real problem of losing its men in the field. The actions of the governments of the different states and the Confederacy would complicate this situation. The second issue that directly affected cavalry organization in the Valley was the nature of Ashby's command. This issue is important because several organizational concerns result from the nature

and development of Ashby's command. Because these two issues directly affected the cavalry organization in the Valley, they both warrant further discussion.

The End of the First Year

As April of 1862--the end of the first year of the war--approached, the Confederacy was faced with a serious problem. What were they going to do if the men did not reenlist? In anticipation of this anniversary, the Confederate Congress passed the Furlough and Bounty Act in December of 1861. This act addressed the problem of retention by providing an incentive, both pay and time off, for those enlisted soldiers who reenlisted for three years or the duration of the war. During this same period, many states, as well as the Confederate government, were considering conscription laws. Many soldiers elected to accept the provisions of this Bounty and Furlough Act in light of the impending conscription acts of both the Virginia and Confederate governments. The Furlough and Bounty Act further allowed soldiers to choose their branch of service and, under certain conditions, to elect their officers.[33]

The effect of the Bounty and Furlough Act on Jackson's Valley Army cannot be understated. After Jackson's operations in January, Valley soldiers, by the hundreds, signed their reenlistment papers and vanished on leave, a provision of the act. Many soldiers would look for transfers into the cavalry, but most just wanted the time off. During this time, regiments shrunk into companies, companies into squads. At the end of February, the Valley Army was down to 40 percent of its strength; only 5,400 effectives out of 13,759 enrolled were present for duty.[34]

Like the entire Confederate Army, Jackson's Valley Army faced the challenges brought on the approaching anniversary of the start of war. Both governments and individuals were reacting to it. The laws passed by both the Virginian and Confederate governments complicated the situation. The challenge to military leaders in the Confederacy, at all levels of command, was a significant one. Jackson faced a real organizational challenge, fueled by personnel

shortages, as he began his Valley Campaign in earnest in the spring of 1862. These challenges

transcended any one branch of the service and held consequences for all, including the cavalry.[35]

Ashby's Command

The second organizational issue that needs consideration involves the nature of Ashby's

command. Two particular areas are highlighted here. First, Ashby was receiving organizational

guidance from the Confederate Secretary of War throughout the entire Valley Campaign. This

fact, in combination with the personnel realities already discussed, created an organizational

challenge for Ashby. Second, Ashby was a strong proponent and employer of combined arms,

particularly cavalry and artillery.

Organizational Guidance and Command Relationships

By the time Jackson assumed command of the Valley District in November of 1861,

several operational actions, which had transpired over the previous months, affected the

organization of the 7th Virginia. Around the twenty-third of July, Ashby, along with two

companies, conducted operations in Jefferson and Berkley counties. (These two counties are the

most northern counties of Virginia, now West Virginia.) From July to October, Ashby's

command had grown to four companies of cavalry from the 7th Virginia and four companies of

infantry from Colonel Alexander Monroe's 114th Virginia Militia. Ashby's command was

responsible for picket duty in the region and conducting raids. These raids focused on the B&O

Railroad and C&O Canal. Colonel McDonald, with the remainder of the 7th Virginia, conducted

operations from Winchester in July and Romney, in western Virginia, in October. Effectively

from the 23 July until Jackson assumed command of the Valley District, McDonald's and

Ashby's commands were independent operations directed from Richmond.[36]

During his command, Colonel McDonald lost the respect and confidence of his men.

This occurred for several reasons. First, McDonald was sixty-three years old and challenged

physically with rheumatism. This greatly reduced the mobility of his operations. Second,

Federal forces routed McDonald's command at Romney on the twenty-third of October. In this battle, McDonald's force lost its cannons, 300 small arms, and all of its supplies.[37] Third, Ashby, although a separate command, had achieved success in his operations and was winning the respect of the men under his command, others under McDonald's command, and others not yet under anyone's command.[38]

A. R. Boteler, a Confederate Congressman from northern Virginia and aware of the situation in the northern Virginia, began a campaign to secure an independent command for Ashby as early as the 24 October. Boteler communicated with Confederate Secretary of State Robert M. T. Hunter on this issue immediately following a successful attack by Ashby against Union forces at Bolivar Heights west of Harpers Ferry. In this communication, Boteler requested a promotion to colonel for Ashby for several reasons. First, Ashby was currently in command of a combined arms force that placed colonels, as militia leaders, under his command. Second, several hundred civilians wanted to volunteer for Ashby, but they wanted assurances that they would not fall under McDonald's command. This possibility would become a reality when Ashby's temporary command position in Jefferson County ended. Third, if promoted and given the authority to form a new regiment, Ashby would be able to bring new recruits into Confederate service. Finally, Boteler and other leaders in the northern Virginia area were calling on Richmond for more competent senior leadership in the region. Boteler saw Ashby as a more than capable officer to meet this requirement.[39]

Boteler's campaign on behalf of Ashby was eventually successful. In February, Ashby received approval by Confederate Secretary of War Benjamin to raise cavalry, infantry, and heavy artillery troops. Supplementing this initial approval, Benjamin also authorized Ashby to recruit, through either reenlisting existing companies or enlisting new companies, ten companies of cavalry and to organize them into a regiment. On 17 March, Ashby reported to Benjamin that he had raised eighteen companies--one artillery, the rest cavalry. Some of these were companies

already under his command in the 7th Virginia. In addition, Ashby indicated to Benjamin that

several other companies were about ready to organize--four cavalry and two infantry.[40]

In relation to the organization of the cavalry in the Valley, the actions by Boteler and the

Secretary's support for the building of Ashby's command are significant. In combination with

the personnel problems previously discussed, Ashby faced the challenge of organizing these new

recruits while conducting wartime operations. This challenge particularly manifested itself as

discipline problems among some of Ashby's men. (Specifics of this situation will be presented

in more detail later in the thesis.) In addition, evidence shows that Jackson was not fully aware

of the government's support for Ashby's efforts to increase his command.[41] The nature of the

personnel environment in the spring of 1862, Ashby's government-sanctioned growth, and

Jackson's reaction to the disciplinary problems of some of Ashby's men came to a "boiling

point" in late April of 1862. Because of the organizational nature of this problem, a few

comments are necessary to explain the situation.

From October 1861 through April of 1862, Ashby's command had been growing. At the

beginning of 1862, the 7th Virginia included ten companies. By 10 February, Ashby's command

included fourteen companies. By 17 March, four additional companies joined, bringing Ashby's

command to eighteen companies. Before 15 April, the rolls of the 7th Virginia had swollen to

over twenty companies. Ashby reported to the War Department on 25 April that his command

included twenty-three companies, several companies of which were large enough to split into two

companies. These companies were split in early May bringing Ashby's total to twenty-five

companies of cavalry and one battery of artillery, Chew's Battery.[42]

This had not been Ashby's primary focus during this time because he had been

conducting operations during this time as well. In his letter to Secretary Benjamin on 17 March,

Ashby explained his recruiting efforts this way. "I have not raised as many companies as I could

have done as I have not wished to interfere with companies and regiments which have been in the

Service belonging to other commands but have devoted myself to enlisting from those who have not been in the service before."[43]

After several particular incidents, Jackson decided to take steps to improve the discipline of his cavalry troops. On 23 April, Jackson published an order that significantly altered Ashby's organization. Ashby's command was to ordered split between Brigadier General William B. Taliaferro and Brigadier General Charles S. Winder. Effectively, Ashby lost his command. Ashby was to be in command of the advance and rear guard and to request troops as needed from Taliaferro and Winder. Because of this order, Ashby tendered his resignation to Jackson.[44]

The organization question was one of command relationships. In the today's parlance, did Jackson have combat command (COCOM), operational control (OPCON), or tactical control (TACON) of Ashby's forces? Jackson's move in regard to the 7th Virginia would, in today's terminology, equates to COCOM. Of course, the Confederacy had not developed an organizational doctrine as complete as exists today. Application of today's standards to the situation in the Confederacy in 1862 reveals that the relationship between Jackson and the 7th Virginia prior to Jackson's 23 April order most closely represented an OPCON relationship. According to the 1993 edition of *FM 100-5 Operations*, OPCON "provides full authority to organize commands and forces and employ them as the commander considers necessary. . . . OPCON does not normally include authority to direct logistics, administration, internal organization, or unit training."[45] Ashby believed Jackson was overstepping his authority because Ashby had Secretary Benjamin's approval to raise and create an independent command. Using today's terms, Ashby did not believe Jackson had the authority to exercise anything greater than TACON over his forces. Jackson's point of view more closely resembled, in today's lexicon, COCOM. Within an hour of talking directly with Ashby, Jackson countermanded his order. A full reading of the correspondence between Jackson, Benjamin and Ashby leads one to

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believe the command relationship, by today's measure, was on the spectrum between TACON and OPCON.

A number of historians have argued that Jackson backed down to Ashby because of the threat of Ashby's resignation. Some argue that Jackson, because of the popularity of Ashby and the devotion of his men to him, was afraid of the consequences if Ashby resigned. A number of Jackson biographers, including Dr. Robert Dabney, who served on Jackson's staff, believe this point of view. A closer look at the evidence might indicate otherwise. Jackson was not a man to be intimidated. Jackson was not likely to change his opinion, in particular to questions that involved duty or discipline, for a reason such as intimidation. As Avirett put it, "To one correctly impressed with Jackson's true character it is apparent that if, in his judgement, the efficiency of the army demanded the enforcement of the order, it would be enforced at all hazards."[46]

It appears that Ashby and Jackson resolved the problem because they each recognized the position of the other. "Jackson was right. Ashby was right."[47] Jackson's correspondence to Richmond following the incident leaves the impression that Jackson was unaware of the guidance from the Secretary of War to Ashby. In addition, Jackson made it clear that he was deferring to Richmond's authority to resolve the problems associated with Ashby's command. In his communication, Jackson did not back down on his assessment of the organizational and disciplinary problems in Ashby's unit, but rather, recognized that the direction for those changes would have to come from Richmond.

Evidence also supports the position that Ashby understood Jackson's concerns as well. In discussion with Colonel Thomas T. Munford of the 2nd Virginia Cavalry Regiment, a cavalry commander who worked with Ashby in the Valley, Ashby acknowledged the discipline and organizational challenges in the 7th Virginia. If the difference of opinion went beyond the command relationship issue, it is unlikely that Jackson would have rescinded the order. After the

hour-long meeting, the two men were observed to both be in good spirits. Within the hour, Ashby was out "riding his usual long wearisome rounds on outpost duty."[48] The real issue in this case was the command relationship between Jackson and Ashby. The evidence supports the conclusion that the two agreed on this principle point and that, following this incident, their relationship was restored.[49]

Combined Arms

Another important aspect of Ashby's command worthy of mention is its combined arms nature. While operating his independent command in Jefferson and Berkeley counties in October of 1861, Ashby had shown an ability to exploit the benefits of combined arms in his operations. His attack at Bolivar Heights west of Harpers Ferry is an excellent example of this. In this engagement, Ashby combined all three combat arms--infantry, artillery, and cavalry--in order to force the Federals from the heights.

This success likely contributed to Ashby's support for the inclusion of a horse artillery battery in his regiment. In November of 1861, Ashby received approval from the Secretary of War for the first horse artillery company in a Virginia cavalry regiment. Although the battery was small, three cannons and thirty-five soldiers, Ashby used them consistently in his operations during the Valley Campaign. Other cavalry leaders were contemplating a similar combination of artillery and cavalry, but Ashby had the distinction of creating the first horse artillery unit in the war. By the end of the campaign, Captain Chew, the battery's first commander, fought with Ashby in hundreds of engagements and skirmishes. While conducting rear guard operations, a mission in which he excelled, Ashby would routinely combine his cavalry forces with those of artillery and infantry. Throughout the campaign, Ashby's cavalry fought mounted and on foot, most often mounted. However, in comparison to other cavalry units, the 7th Virginia spent a greater amount of their time conducting mounted operations and small-scale charges against the army. (Ashby's cavalry focused on mounted tactics for two primary reasons. First, Ashby and

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his men were generally exceptional riders. Second, Ashby constantly struggled to get firearms for his men. Most of the arms Ashby's men received were taken from Federal soldiers after a successful charge.) Ashby's combined arms focus and integration of that principle in his organization greatly influenced the success of his operations.[50]

Cavalry Logistics

Over time, the importance of logistics to the success of a military operation has gained recognition. Central to today's military doctrine is the integration of logistics at every level of military operations. In 1861 and 1862, the importance of logistics was not as clearly accepted as it is today. Several fundamental principles that prevailed in Confederate logistical operations had direct influence on cavalry operations in the Valley. The more important of these will be considered here.

Throughout the war, logistics would prove a significant challenge for the Confederacy. This fact was certainly true in relation to cavalry operations. In terms of logistics, the supply of horses and armament for the cavalryman is the most significant logistical requirements that deserve particular mention.

Horse Supply

From the beginning of the war, the Confederacy required that cavalrymen supply their own horses. The Volunteer Act of 6 March 1861 specified this requirement. Under the policies of this act, the Confederate government would provide for food and shoes for the horse. The soldier would receive a usage rate of 40 cents per day. If the horse died in battle, the cavalryman received fair valuation for the horse. If the horse was captured or worn out, the loss was borne by the owner. Upon the loss of his horse, it was the responsibility of the cavalryman to find a remount. Although adopted at the beginning of the war, this policy would remain effectively unchanged for the war's duration. Not until 23 February 1865, too late to make a difference, did

the Confederate Congress pass a law requiring the Confederate Quartermaster General to provide horses to cavalrymen.[51]

The Confederate government adopted this policy for a number of reasons. As was already discussed in chapter 2, the primary initial reason was to reduce the burden on the government for the additional resourcing requirements of cavalry units. As the war progressed, the Confederacy was unable to modify this policy because the demand for horses for use in the artillery and supply trains already overtaxed the Confederate supply system. The early loss of influence in Kentucky and vast areas of Tennessee exacerbated the availability of horses for the Confederacy. Initially, this policy allowed the Confederacy to expedite the fielding of cavalry forces. As the war progressed, the Confederacy desperately needed a new approach for resupplying its cavalry with horses, but the realities and constraints of war made implementation of any other policy impossible.[52]

In its implementation, the Confederacy's horse policy required that a cavalryman receive a degree of freedom to care for his horse and a furlough, if necessary, to acquire a replacement horse. A Virginia cavalryman may have been able, early in the war, to return home to get a new horse. For a soldier operating in the Valley from another state, however, this option was unavailable. He would have to "borrow" a horse from a Federal soldier or from someone's barn. As the war raged on, the time and challenge of finding a new horse became proportionally more difficult.[53]

The necessity of allowing a cavalryman the opportunity to care for his existing horse or acquire a new one led to disciplinary problems. Some soldiers would often exploit this freedom and ignore their duty. They would take liberties to find meals or visit friends and relatives. Legitimate reasons or not, rarely early in the war, and never towards the end of the war, did a Confederate cavalry unit's actual strength reach its paper strength.[54]

Another consequence of the difficulty of maintaining their horses was the fact that cavalry units began to see the development of a company of permanently dismounted men. This company received the designation as "Company Q." If a cavalryman could not find another horse, he transferred to another branch of service or was placed in Company Q. Evidence supports the conclusion that some soldiers resided in Company Q in order to avoid their duty, but many more languished in this company because of the difficulty of acquiring a horse. Confederate Captain John Lamb made the following observation following the war: "Many a gallant fellow, whose horse had been wounded or worn out in the service--for these he could get no pay--impoverished himself and denied his family that he might stay with his command and not be transferred to other arms of the service, or enrolled in Company Q."[55]

Despite these obvious drawbacks, the Confederacy's logistical approach to cavalry horses was not all negative. The first consequence of this policy was to ensure that cavalrymen were already familiar with horses and capable of caring for and riding them. Early in the war, Confederate cavalry-riding skills were generally superior to many Federal cavalry units for this reason. In addition, ownership of the horse and the difficulty of acquiring a new mount increased the motivation for a soldier to provide the appropriate level of care for his horse. Early in the war, the Confederate approach encouraged the enlistment of some of the finest horseflesh in the South. On average, the value of Confederate horses was much higher than the similar value of horses enlisted by the North.[56]

Cavalry Armament

From the beginning of the war, the Confederacy decided that many of the logistical requirements of the cavalry would be borne by the cavalryman. In particular, the horse accouterments, like the horse, were the responsibility of the rider. Eventually, the Confederacy would begin to supply a saddle because the common English Roundtree saddle caused soreback horses. Confederate cavalrymen would decry the quality of these saddles as compared with the

Union McClellan saddle.[57] Apart from the saddle, provision of any other horse riding and maintenance equipment was the responsibility of the rider.[58]

The Confederacy had difficulty providing weapons to all of its soldiers in the field, the cavalry included. Commentators on the Civil War have made much of the industrial might of the North vis-a-vis the South. The general conclusion is that the South was unable to arm its soldiers because of a lack of industry. In fact, the problem was more accurately one of distribution. At the start of the war, the South seized from Federal arsenals a total of 190,000 small arms, 8,000 cannon, and 350,000 rifles and muskets. Certainly much of this equipment was old, but not all of it. Even some of the most-dated equipment was equal or better for combat than the shotguns and sporting pieces with which whole regiments of the first volunteers were armed. Even a year after the war began, Confederate units were still going into battle armed with shotguns, while excellent rifles were stockpiled in state armories. In 1861, the real shortage in armaments was in the area of sabers, revolvers, and powder. It is true that when the war began, except for the Federal Armory at Harpers Ferry, there was no facility in the South where arms could be manufactured. However, under the administration of Josiah Gorgas, chief of the Ordnance Department, the Confederacy met the demands upon it, to include the production of some of the best powder in the world. After passing several laws to enhance powder and weapons production, the Confederate Secretary of War, by the fall of 1863 stated: "Production of powder and weapons had increased so much that the Confederacy could arm itself for the rest of the war."[59] Although southern ordnance was generally several stages behind the North in terms of newer and more lethal technology, good equipment was available. The difficulty for the Confederate soldier was getting that weapon into his hand. Throughout the war, some states were hesitant to make seized arms available to the Confederate government, preferring to maintain this equipment for their state militias.[60]

Throughout his tenure as commander of the 7th Virginia, Colonel Ashby had difficulty securing weapons for his men. He made numerous requests for supplies and arms. In one report, dated 17 March 1862, Ashby confessed that one of his men participated in a charge while riding horseback armed with only a club. Because of the success of his charge, this soldier was able to acquire some equipment from the Federals. Only a few days before his death in June of 1862, Brigadier General Ashby expressed his concern to a member of Jackson's staff about the difficulty of arming his soldiers. Consistently throughout the campaign, cavalry forces would be plagued with a difficulty of getting arms through the supply system. The most reliable source of equipment was from the defeated enemy.[61]

Cavalry Tactics

Another factor that directly affects a military unit's effectiveness is its tactics. In discussing this factor, several subcategories need consideration. These include cavalry unit sizes, cavalry formations, cavalry armament, and cavalry missions.

As was discussed in chapter 2, the early 1860s cavalry tactics originated in the U.S. War Department's published tactics of 1841. These tactics were often called the *'41 Tactics* or the *Poinsett Tactics*, named after then Secretary of War J. R. Poinsett. Albert Bracket in the *History of the U.S. Cavalry* stated that, as of June of 1863, "Almost every cavalry officer of experience considered the *'41 Tactics* far superior to anything which had yet been introduced into the service."[62] The Confederate cavalry in the East, like their Federal counterparts, relied on a slightly modified version of the *Poinsett Tactics*, called *A Revised System of Cavalry Tactics*. A simplified version of the Confederate variation was also widely distributed. This version was the *Trooper's Manual* written by Colonel J. Lucius Davis.[63]

Cavalry Unit Sizes

The *Trooper's Manual* identified many particulars about the disposition of cavalry forces. A typical cavalry regiment consisted of five squadrons, each squadron with two troops or

companies. Each company consisted of eighty men, including a captain and two lieutenants. The squadron, led by the senior company commander, numbered about 160. A regiment numbered about 800 men. A brigade would consist of at least two regiments, typically four or five, and each regiment included a colonel, a lieutenant colonel, and a major. These figures are the actual numbers provided in the *Trooper's Manual* and, as such, represent the paper strength of cavalry units.[64]

The actual size of Confederate cavalry units was considerably smaller and consistently declined as the war raged on. John Thomason, in his biography of Jeb Stuart, described the situation this way: "I have not found a gray cavalry regiment that had more than 650 effectives. The regiments of 1862 would average about 500; in 1863, from 300 to 500; and after that, never above 350."[65]

Cavalry Combat Formations

According to *Trooper's Tactics*, an entire regiment formed into a single battle formation. Two squadrons of the regiment formed in a single line of about 200 abreast. Behind that front line, 150 to 200 paces, would be formed two squadrons in columns of twos or fours. Behind the flanks of this line was the fifth squadron in columns of twos or fours.[66]

Throughout the Valley Campaign, combat formations were considerably smaller than directed in the *Trooper's Tactics*. This reality existed for several reasons. First, the 7th Virginia, that constituted the preponderance of the cavalry force for most of the Valley Campaign, was being formed and mustered during the period of the campaign. Second, the missions given to the cavalry forces during the campaign prevented a large consolidation of cavalry forces at any one place and time. On the battlefield, Confederate cavalry units were consistently less than regimental size. Consequently, combat cavalry formations typically mirrored those specified in *Trooper's Tactics*, but on a smaller scale.

Cavalry Armament

The Confederate cavalry typically carried a variety of weapons. Essential to the shock action of cavalry was the saber. "Its moral influence is great. The fannade, the glitter of the keen blades in the air in the event of a charge, produce in themselves a most terrifying effect."[67] It is important to note that within the Confederacy, there was a difference of opinion about the importance of the saber. Brigadier General Wheeler, who commanded cavalry in the West, is the source of the quote mentioned above. Brigadier General Forrest, also operating in the West, preferred to use shotguns and pistols. Some of Forrest's cavalry carried sabers, but rarely used them.[68] Partisan cavalry, like Morgan's cavalry in the West and Mosby's Rangers in the East, which operated under the auspices of the Partisan Rangers Act of 1862, found little use for the saber and did not use it.[69] In the East, however, cavalry units were more likely to be armed with sabers, when they could be found. In addition to the saber, cavalry soldiers carried at least one revolver for individual combat. In terms of the debate on which was the best weapon for cavalry, one cavalry expert provided this perspective. "Each weapon has its distinct and proper uses, and neither can replace the other."[70]

The final weapon used by the cavalry was a rifle or shotgun. As the war went on, the carbine became the long-arm weapon of choice. Whereas the Union cavalry, over time, began to introduce breech-loading carbines, the Confederate cavalry used muzzle-loading carbines. This distinction developed for a number of reasons, but the most significant of these was an inability of the Confederacy to find enough brass to produce the cartridges for the ammunition.[71] In summary, cavalrymen generally used the saber in the charge and the initial melee, the revolver in individual conflict, and the rifle or carbine in the defense.

Like other Confederate cavalry units, Jackson's Valley cavalry had difficulty receiving adequate arms. Initial volunteers were generally poorly armed. Few had sabers and those used were often heirlooms that had done duty in the Mexican War, or before. Many soldiers carried

shotguns and other sporting pieces. As the campaign progressed, like other Confederate units, Jackson's Valley cavalry armed itself with captured Union equipment.[72]

Cavalry Missions

During the period of the 1862 Shenandoah Valley Campaign, Confederate cavalry forces in the Valley would perform a variety of missions. In describing these missions, Alonzo Gray's *Cavalry Tactics as Illustrated by the War of the Rebellion* is used as a principle source because it provides valuable information on the use of cavalry in the Civil War. This information is particularly useful because its discussion and conclusions are based on an exhaustive study of *The War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies.*

Typical cavalry missions executed throughout the Valley Campaign fell broadly into three categories. The first category is that of battlefield missions and includes the more specific missions of shock action and pursuit. The second category is that of security and includes guard missions, outposts, and screening missions. The third category of missions is information missions. This area includes the missions of screen penetrations, scouting, and spying. The final category is miscellaneous cavalry missions, which includes couriers, pickets, supply and baggage train duty, and others. For the purpose of this thesis, the raid mission is also included in the miscellaneous category because cavalry raids did not play a significant role for cavalry forces in the Valley Campaign.

Battlefield Missions

This category of missions, as the name implies, includes a subset of missions that directly involved cavalry operations on the battlefield. The two most significant of these missions include shock action and pursuit.

Shock Action

One of the primary missions for the cavalry was to conduct a shock action or charge. When and how to conduct such missions is outlined in the *Trooper's Manual*, but the actual practice of such actions were categorized, after the fact, by Gray. In his work, several characteristics of shock actions surfaced. The primary purpose of the attack was to dislodge an enemy from his position or prevent him from consolidating his position. As compiled by Gray, the saber was the primary weapon used in the charge except on unsuitable ground where the revolver was substituted.

In conducting a charge, several principles represented the keys to success. First, ultimate success primarily depended on the commander. "A cavalry commander must make a quick decision and quickly take the initiative. A timid cavalry leader will usually fail where a bold one will succeed."[73] Second, a charge was best met with a charge. Third, care should be taken to ensure that the cavalry did not arrive at the charging point in a distressed condition. Fourth, shock attacks on artillery were best conducted in the flanks and when the artillery was not supported by infantry or dismounted cavalry. Finally, the experience of the Civil War showed that cavalry shock action against unshaken infantry in its front would not likely succeed. To conduct a charge against infantry, the use of combined arms was essential for success. These principles are not presented here as a "cookbook solution," but rather as useful tools to understand and evaluate a cavalry charge.[74]

As explained in chapter 2, the doctrinal charge, regimental size or larger, rarely occurred in the Civil War. The doctrinal charge would be similar to that expressed in the European model or supported, in doctrine, in the American manuals of the day. The reason why this type of charge was rare was explained already. Nonetheless, smaller formations of cavalry forces did use shock action on numerous occasions. The doctrinally described charges did take place throughout the war, but albeit less frequently. These charges typically occurred in cavalry-on-cavalry battles. The Battle of Brandy Station and the cavalry action east of Gettysburg on that

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battle's third day are two striking examples. That said, it is important to note that shock action by smaller sizes of cavalry forces, particularly in smaller engagements, occurred with much more regularity.

Pursuit

The second battlefield mission performed by cavalry forces was the pursuit mission. Although a modern definition, 1993's edition of FM 100-5's definition of pursuit is equally valid for forces fighting in 1861: "A pursuit provides an offensive operation against a retreating enemy force. It follows a successful attack or exploitation and is ordered when the enemy cannot conduct an organized defense and attempts to disengage. The object of the pursuit is destruction of the opposing force."[75] Because of their operational mobility, cavalry forces are well suited to conduct the pursuit phase of a battle. "Fresh infantry can pursue defeated infantry, but exhausted infantry cannot. In this case, cavalry is needed."[76] A well-executed cavalry pursuit generally involved three forces. Two forces pursued the enemy along parallel lines with the retreating enemy force, harassing that enemy force from the flanks. A third force would assail the enemy from the rear, forcing the enemy to deploy as frequently as possible. This pursuit action would, over time, stall the enemy and allow it to be surrounded and destroyed in detail.[77]

Security Missions

One of the primary uses of the cavalry was in the conducting of security missions. Under this general subject area, several distinct missions for the cavalry existed. Security was provided through advance, rear and flank guards. In addition, outpost and screening missions also provided security.

Guard Missions

As a means of security, guard missions most commonly occurred while the army was on the move. As the army was advancing, the advance and flank guards could be used to determine enemy formations, composition, and location. With this information, a commander could assess

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the likely actions of his enemy and potential interference from that enemy as it related to the advancing commander's plan of advance. Rearguard operations were most commonly conducted while an army was withdrawing from contact with the enemy. This mission allowed the army to move and reorganize. This mission was particularly important to prevent an enemy from exploiting the success of a battle through the initiation of pursuit. As the war progressed, the use of cavalry forces to conduct rearguard missions was more common due, in large part, to the operational mobility of cavalry forces as compared to infantry forces. As a rule, advance and flank guard missions could be thought of as more offensive in nature while rear guard missions could be thought of as more defensive in nature. Guard missions allowed the commander time and space to maneuver his own forces while providing information about engaged enemy force composition, disposition, and likely intentions.[78]

Outposts and Screening Missions

Outposts were another means of security. Outposts performed a similar function to that of pickets. They allowed an army a degree of security by providing advance warning of the approach of an enemy. Outposts were generally mounted pickets located further away from the army's concentration than infantry pickets.

Screening missions also fall under the general guideline of security. In relation to the area of operations of the army, screening missions occupy larger geographical areas than guard missions and often occurred outside the range of outposts. Screening prevented the enemy from ascertaining one's true intentions and allowed one's forces to achieve a degree of surprise. Several times during the Valley Campaign, Jackson's cavalry conducted highly effective screens that allowed Jackson to concentrate his infantry forces in places where the enemy was not expecting. During the advance down the Valley on Winchester in May, Jackson effectively used a cavalry screen, thereby surprising Union Major General Banks. He described this action in his after action report this way.[79] "To conceal my movements as far as possible from the enemy,

Brigadier General Ashby, who had remained in front of Banks during the march against Milroy, w̄ ːrected to continue to hold that position until the following day, when he was to join the main body, leaving, however, a covering force sufficient to prevent information of our movements crossing our lines."[80]

Information Missions

As many Civil War leaders frequently remarked, the cavalry played a premiere role as the "eyes and ears" of the commander. In terms of cavalry efforts that supported the gathering of information about the enemy, the cavalry employed several different missions. Typically, these missions involved strategic reconnaissance and included enemy screen penetrations, scouting, and spying.

Screen Penetration

As was mentioned already, screening was initially dependent on the separation of cavalry forces. An attempt to penetrate an enemy screen required concentration. As the penetration attempt progressed, the enemy screen might devolve into concentration as the enemy screen collapsed on itself and its screened force. The basic intention of screen penetration was to ascertain information on the enemy, the same information the enemy screen was attempting to hide. Cavalry forces conducting screen penetrations were conducting offensive operations and were generally operating a considerable distance from its main body. Successful penetration of an enemy screen or the lack of an enemy screen allowed cavalry forces to secure valuable strategic reconnaissance information on the enemy.[81]

Scouting and Spying

Scouting and spying were not missions peculiar to cavalry forces; however, cavalry forces were particularly well suited to conduct them. The operational mobility of cavalry forces well equipped them to operate behind enemy lines in order to gather and report strategic reconnaissance information on the enemy. Unlike screen penetration missions, scouting and

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spying were best conducted without concentration. Good scouting teams were often just pairs of soldiers. However, a good network of scouts and spies required multiple inputs of information that could be independently compared and verified. Although civilians were used throughout the war in these capacities, Alonzo Gray's careful assessment of the *Official Records* of the Civil War led him to conclude that the "information obtained from independent cavalry by strategic reconnaissance was much more accurate and valuable than that obtained from civilians."[82]

Miscellaneous Missions

Cavalry forces also participated in a number of miscellaneous missions throughout the Valley Campaign. These missions included typical noncombat roles like courier duty. They also included the typical infantry missions of picket duty and supply and baggage train defense.

Jackson's cavalry performed courier duty, but only rarely. This duty was one that was much more common in the Federal army, particularly before 1863. The unique capability of cavalry, particularly its mobility, was lost when the cavalry was "tied down" on picket duty or when supporting the trains. In the Valley, picket duty for the cavalry most often occurred at outposts. Defense of the trains, by cavalry forces, was most often conducted by Company Q, the cavalry company for cavalrymen without horses.

Raiding was considered as a unique cavalry mission. Within this thesis, raiding is included under the miscellaneous category because the Valley Cavalry raids conducted were small affairs, more aptly described as localized missions--not raids in the truest sense. Raiding, as a distinct cavalry mission grew in frequency and scope as the war progressed. This type of independent raid mission was first exploited by Jeb Stuart during McClellan's Peninsular Campaign against Richmond. Raids could seriously disrupt an enemy's rear area. As a Confederate partisan operating in northern Virginia, John Mosby conducted numerous raids that consistently harassed Federal lines of communication.

Conclusion

The effectiveness of a military unit depends upon a number of factors. Some of the more important of these factors include leadership, organization, logistics, and tactics. This chapter has focused on each of these particular areas as they directly related to Confederate cavalry operations in the Valley Campaign of 1862. As the campaign analysis unfolds in the following chapters, an effective and accurate analysis of the campaign will relate back to the general areas discussed in this chapter--leadership, organization, logistics, and tactics.

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[1] Darryl Lyman, *Civil War Quotations* (Conshohocken, PA: Combined Books, Inc., 1995), 232.

[2] Brigadier George H. Steuart accepted the title of "Maryland" to distinguish himself from Brigadier Jeb Stuart, another distinguished Confederate general. As a prominent citizen of the state of Maryland, George Maryland Steuart's title seemed appropriate for the committed Confederate.

[3] James I. Robertson Jr., *Stonewall Jackson: The Man, the Soldier, the Legend* (New York: McMillan Publishing USA, 1997), 14.

[4] David Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1995), 30.

[5] Martin, 55.

[6] Martin, 56.

[7] Martin, 56.

[8] Martin, 80.

[9] Because the primary rivers in the Valley flow northward, the upper Valley is the southern portion of the Valley. The lower Valley is the northern portion.

[10] Henry Kyd Douglas, *I Rode with Stonewall* (Chapel Hill, NC: University of North Carolina Press, 1940), 68. Quote attributed to Jackson.

[11] Lyman, 80.

[12] Robertson, 922.

[13] Brigadier General Thomas Munford, "Reminiscences of Jackson's Valley Campaign," *Southern Historical Society Papers*, vol. 7 (Carmel, IN: Guild Press of Indiana, Inc., 1999), 533. CD ROM.

[14] Charles L. Dufour, *Nine Men in Gray* (Lincoln, Nebraska: University of Nebraska Press, 1993), 43.

[15] James B. Avirett, *Ashby and His Compeers* (Baltimore: Selby and Dulany, 1867), 17.

[16] Dufour, 43.

[17] Dufour, 44.

[18] Avirett, 20.

[19] Dufour, 43.

[20] Avirett, 22, 30.

[21] Avirett, 59.

[22] Dufour, 44; and Avirett, 60-63.

[23] Avirett, 18.

[24] Avirett, 121.

[25] Dufour, 61.

[26] Avirett, 163.

[27] Dufour, 43.

[28] Steuart Sifakis, *Compendium of Confederate Armies: Virginia* (New York: Maple-Vale Book Manufacturing Group, 1992), 103,111; and Richard N. Current, ed., *Encyclopedia of the Confederacy*, vol. 4 (New York: Simon and Schuster, 1993), 1543.

[29] Current, 1543.

[30] Randolph H. McKim, *A Soldier's Recollections* (New York: Longman's, Green & Co., 1910), 41.

[31] McKim, 40-45.

[32] Unless otherwise stated, the 7th Virginia will be used in reference to the 7th Virginia Cavalry Regiment.

[33] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 5, 1016. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted).

[34] *OR*, vol. 5, p. 1086.

[35] In light of the personnel challenges faced by the American military at the dawn of the new century, it is reassuring to remember that the challenge of retention and manning are not new. This challenge is a natural aspect of a volunteer military system. The Confederacy, and the Union, faced this challenge even in the midst of a national struggle. Without that natural motivation to join, is it surprising that the U.S. military today is challenged to fill it rolls with volunteers?

[36] *OR*, vol. 5, p. 858; *OR*, vol. 5, p. 248; and Richard L. Armstrong. *7th Virginia Cavalry* (Lynchburg,VA: H. E. Howard, Inc., 1992), 6.

[37] *OR*, vol. 5, 380.

[38] *OR*, vol. 5, 200.; and Armstrong, 13.

[39] *OR*, vol. 5, 919; Dufour, 56; and *OR*, vol. 5, 890.

[40] Dufour, 65.

[41] The command structure was complicated for several reasons. First, Ashby was only the acting commander of the 7th Virginia. Second, Ashby was under direction to create a new unit under the orders of Confederate Secretary of War Benjamin. Third, the communication from Benjamin did not flow through Jackson's Chain of Command.

[42] Armstrong, 20-21, 25-27; and Dufour, 57.

[43] Dufour, 57-58.

[44] Dufour, 63-65.

[45] US Army, FM 100-5, *Operations* (Washington, DC: Department of the Army, 1993), 4-2. (Cited hereafter as FM 100-5).

[46] Avirett, 178.

[47] Avirett, 177.

[48] Avirett, 177.

[49] *OR*, vol. 22, part 3, 880; and Dufour, 64.

[50] Dufour, 54; and Armstrong, 16.

[51] Wilfred Buck Yearns, *The Confederate Congress* (Atlanta, GA: University of Georgia Press, 1960), 125-126.

[52] Gregory J. Urwin, *The United States Cavalry* (Dorset, United Kingdom: Blanford Press, 1983), 112-113.

[53] Paddy Griffith, *Battle Tactics of the Civil War* (New Haven, CT: Yale University Press, 1989), 183.

[54] John W. Thomason, *Jeb Stuart* (London: C. Scribner's Sons, 1929), 74.

[55] Captain John Lamb, "Its Wants, Trials, and Heroism, " *Southern Historical Society Papers,* vol. 26 (Carmel, IN: Guild Press of Indiana, Inc., 1999), 360. CD ROM.

[56] Stephen Z. Starr, *The Union Cavalry in the Civil War* (Baton Rouge, LA: Louisiana University State Press, 1979), 211-213.

[57] The McClellan saddle was invented by Captain George B. McClellan as a result of his observations of the Crimean War. The saddle's design was based on the Austrian pattern. This saddle became the standard for the U.S. cavalry in the 1850s and remained the official saddle of the U.S. cavalry until the end of its horse days.

[58] Lamb, 361.

[59] Yearns, 127.

[60] Thomason, 66-70.

[61] Armstrong, 17-28; and Munford, 523.

[62] Albert G. Brackett, *History of the United States Cavalry* (New York: Greenwood Press, 1865), 48.

[63] Thomason, 79.

[64] Thomason, 79. (Details about the *Trooper's Manual* are taken from Thomason's work.)

[65] Thomason, 79.

[66] Thomason, 80.

[67] Alonzo Gray, *Cavalry Tactics as Illustrated by the War of the Rebellion* (Ft. Leavenworth, KS: U.S. Cavalry Association, 1910), 13.

[68] Gray, 14; and James R. Johnson, *Horseman, Blue and Gray* (New York: Oxford University Press, 1960), 31.

[69] Johnson, 60.

[70] Gray, 26.

[71] Philip Katcher, *The Civil War Source Book* (New York: Facts on File, Inc., 1992), 64.

[72] Thomason, 74.

[73] Gray, 34.

[74] Gray, 29-46.

[75] FM 100-5, 7-9.

[76] Gray, 135.

[77] Gray, 133-135.

[78] Gray, 100-103.

[79] Gray, 102-105.

[80] *OR*, vol. 12, part 1, 701.

[81] Gray, 100-105.

[82] Gray, 117.

CHAPTER 4

JACKSON TAKES COMMAND

The Valley District is entirely defenseless and will fall into the hands of
the enemy unless General Jackson has troops sent to him immediately.[1]

General Joseph E. Johnston, *Official Records*

Acting in his capacity as commander of the Department of Northern Virginia, General

Johnston explained the situation in the Shenandoah Valley to acting Confederate Secretary of

War J. P. Benjamin on 7 Nov 1861. At the time Johnston sent this statement, the Confederacy

still held the lower Valley and there was a real concern that the Federals would drive the

Confederates from Winchester and the lower Valley.

Introduction

At the time Major General Thomas J. Jackson assumed command in the Shenandoah

Valley in November of 1861, General Joseph E. Johnston had the responsibility of defending all

of Virginia. In support of that mission, the Confederates divided the territory of Virginia into

different regions. Jackson's area of responsibility was the Valley District. As the quotation

above indicates, Johnston was well aware of the challenges facing Jackson in the Valley.

Despite this understanding, the situation in Virginia prevented Johnston from providing Jackson

with much in the way of resources. Nevertheless, Jackson embarked upon a brilliant six-month

operation, now known as the Shenandoah Valley Campaign.

The purpose of the next few chapters is to analyze the role of the cavalry in the Valley

Campaign. To do this, each of the next few chapters will consider a specific chronological

"slice" of the campaign. In order to complete this analysis, each of the next four chapters will

cover a portion of the campaign and include three primary areas in the analysis: Valley army

operations, cavalry operations, and assessment of cavalry operations.

Chapter 4 will cover the first portion of the Valley Campaign, 5 November 1861 to 23 March 1862. This chapter will sequentially consider Confederate operations from the beginning of Jackson's assignment to the Valley on 5 November through the first major battle of the campaign, the Battle of Kernstown on the 23 March 1862. The first portion of this chapter will cover the Romney campaign, 5 November 1861 through 15 January 1862. The second portion of this campaign will cover the winter period, 16 January 1862 to 20 February 1862. The third portion will cover the prelude to and the Battle of Kernstown, 21 February 1862 to 23 March 1862.

Formulation of a Campaign

Major General Jackson assumed command of the Valley District in Winchester, Virginia on 5 November 1861. Jackson quickly assessed that the situation in the Valley was critical. Federal forces were flowing into western Virginia at an alarming rate. Four thousand enemy troops already occupied the town of Romney and that number was growing daily. Another 2,000 soldiers camped near the Potomac River at Shepherdstown, Virginia and Williamsport, Maryland. In and around Winchester, Jackson's forces numbered less than 2,000 militia-- infantry, artillery, and cavalry. Jackson also learned that the enemy had plans to coordinate the efforts of their forces in the region in order to threaten an advance on Winchester.[2]

Stonewall wasted no time in reacting to the situation. To begin with, Jackson consolidated his infantry and artillery in Winchester. While Jackson waited for Confederate reinforcements to arrive in the Valley, Ashby's cavalry continued to perform its screening mission through its existing array of outposts.

On his first day as commander, Jackson submitted a report on the situation in the Valley District. Included in this report was a foreshadowing of the nature of the campaign Jackson intended to orchestrate. As he would demonstrate throughout the campaign, Jackson intended to exploit opportunities to go on the offensive. Jackson's first report was "deeply impressed with

the importance of not only holding Winchester but also of repelling the invaders from this district before they shall secure a firm lodgment."[3]

The military efforts during this first phase of the Valley Campaign centered on one primary objective--control of Winchester. Sitting just west of the Blue Ridge Mountains, Winchester held the key for controlling the lower Valley. The lower Valley was particularly important because of the line of communication (LOC) that ran along an east-west axis through northern Virginia. The Potomac River, the Baltimore and Ohio (B&O) Railroad, and the Chesapeake and Ohio (C&O) Canal were all concentrated in this region. Forces positioned in Winchester could challenge this LOC. (See Figure 3.)

Sitting just west of the Allegheny Mountains was the small town of Romney. For the Confederacy, western Virginia was more exposed to Union operations than the Valley. This vulnerability contributed to the early successes of the Federals in this region. In their drive for Winchester, Romney was an intermediate objective for the Federals. Jackson recognized the importance of Romney. Because the Confederates already controlled Winchester, Jackson made Romney his initial focus. The towns of Romney and Winchester thus became the two focal points for this phase of the Valley Campaign. Based on these two focal points, two major events transpired during this phase of the campaign, 5 November 1861 to 23 March 1862--the Romney Expedition and the Battle of Kernstown. (Kernstown is a small hamlet located a few miles south of Winchester.) This chapter will cover each of these two topic areas in more detail. Because of the unusual events that transpired in the Valley Army during the winter, a discussion of this period is also necessary.

Romney Expedition
(5 Nov 1861 – 15 Jan 1862)

In late June, the Federals, under command of Brigadier General Benjamin F. Kelley, successfully drove the Confederates from Romney. As he indicated in his initial report on the

situation in the Valley, Jackson perceived the Federal occupation of Romney as a threat to Winchester and the rest of the Valley. In addition, Jackson was receiving disturbing reports on Federal actions in and around Romney. Kelley's forces were burning homes and looting the area. The Federals were collecting as many cattle and as much grain from the area as they could and sending those supplies to Federal forces in the East. Based on the threat presented by the Federals in Romney in the fall of 1861, Jackson chose Romney as the focus of his first efforts in the Valley.[4]

Valley Army Operations

With his true intentions known only to himself, Jackson placed into motion a number of smaller and seemingly unrelated operations that confused his enemies as to his true intentions. The first of these efforts focused on the Chesapeake and Ohio (C&O) Canal. Like the Baltimore and Ohio (B&O) Railroad that paralleled it, the C&O canal was a major east-west transportation route. As of November 1861, transportation on the B&O was already disrupted because the B&O Railroad Bridge across the Big Cacapon River northeast of Romney had been destroyed in July. The canal was being used to ship materials from the West, including western Virginia coal. After the Federal occupation of Romney, the canal was also being used to transfer confiscated resources from the Romney area to the East.

Before advancing on Romney, Jackson conducted several raids against Dam No. 5 of the C&O canal. (See Figure 3.) This dam was located north of Martinsburg. Jackson conducted these raids while waiting for the majority of his reinforcements to arrive. (General Johnston and the Secretary of War Benjamin had arranged to transfer Jackson's Stonewall Brigade from the Potomac District to the Valley. In addition, Benjamin was transferring 4,500 troops to the Valley District from the Kanawha Army operating in western Virginia.)[5]

Jackson's operations against the C&O canal focused on Dam No. 5 with the intention of destroying it, thus making the canal unusable. Operations against Dam No. 5 were conducted on

8 December and then again from 17 to 21 December. Some damage occurred to the dam, but the Federals were able to repair the dam and continue to use it. Though unable to destroy the dam, Jackson's efforts led the Federals to deploy their forces across a wide area. This prevented the Federals from concentrating forces in Romney and masked Jackson's true intentions concerning Romney, forty-five miles southwest of Dam No. 5.[6]

By 23 December, the final reinforcements from the Kanawha Army arrived in Winchester. Brigadier General William W. Loring, commander of the forces transferred from the Kanawha Army, had not been eager to make the transfer to Winchester. Like many soldiers at that time, Loring's soldiers were weary of the war. Loring's men had been anxious to settle into winter quarters when they were ordered to move to the Valley District. The poor weather and the lack of motivation slowed the transfer of Loring's forces to the Valley. Including Loring's men, Jackson's army now numbered 7,500 volunteers, 2,200 militia, and 650 cavalry.[7]

Jackson clearly articulated his intention concerning Romney to his superiors in a report submitted on 23 December. By 1 January, Jackson's army was on the move. Reports from Romney now estimated the Federal strength to be 10,000. Bath, a small hamlet north of Winchester, was Jackson's first intermediate objective on his drive towards Romney. Bath was located six miles south of Hancock, Maryland and contained a Federal force of about 1,400. Bath was important because it was located along one line of communication between Maryland and Romney. Control of Bath was necessary to protect Jackson's flank while he moved on Romney.[8]

Jackson's secrecy about his intentions not only kept his opponents off balance but also began to cause resentment among some of the men under his command. Three elements combined to begin a slow poisoning of the morale of Jackson's army. These elements were the mystery surrounding Jackson's true intentions, Jackson's penchant for secrecy even from his top

commanders, and the particularly harsh winter conditions. The declining morale of his army would confound many of Jackson's efforts throughout his Romney expedition.

Jackson's operation against Bath was plagued with problems. The cold weather, ice, and snow hampered Jackson's movement of men and supplies north. Disgruntled infantry soldiers and their commanders moved slowly on Bath. Despite the lack of enemy opposition, the 30-mile journey from Winchester to Bath took four days. When the attack finally commenced against Bath on 4 January, the enemy was prepared. Although greatly outnumbered, the Federals in Bath, in concert with the weather, slowed the Confederate advance. Faced with an increasing Confederate threat, Union soldiers in Bath eventually chose to withdraw. The lethargic Confederate advance allowed most of the Union soldiers in and around Bath to escape into Hancock, Maryland.[9]

From the 5 to 7 January, Jackson threatened the "Potomac River line from Dam No. 5 to the mouth of the Big Cacapon River."[10] While trading artillery rounds with the Federals on the north side of the Potomac in the vicinity of Hancock, Jackson sent the militia to the west to destroy the B&O trestle that had, only a few days before, been rebuilt over the Big Cacapon River. The winter weather continued to hamper the operation and made the conditions miserable for the army. The Confederate soldiers, under orders, had left their tents in Winchester. Jackson's men spent their nights shielded from the weather with nothing but blankets and tree branches. Because of the proximity to the enemy, Jackson initially prohibited the building of campfires. Corporal George Neese, of Chew's Battery, provides some insight into the condition of Jackson's troops on the hillsides surrounding Bath and Hancock.

> The troughy road is crowed with Jackson's shivering infantry, standing in the cold and dark. The snow is about four inches deep, and the night is very unfavorable for an outdoor performance; and to add to the disagreeableness of the situation, an icy breeze is creeping over the frozen hills and feels like a breath from the North Pole. . . .
> . . . At last, about two hours after midnight, an order came around permitting us to make fires, and I never before saw fences disappear so fast. In twenty minutes after the

"You make fires" was spoken there were a hundred friendly camp-fires cheerfully blazing along the snow hillside.[11]

Jackson's immediate goal at Hancock was the Union supply depot located there. Because the Federals were quickly reinforcing the town of Hancock, Jackson abandoned his effort against the town. An attack against Hancock, after reinforcements arrived, would have likely resulted in heavy casualties. After a day, Jackson continued his advance toward Romney. On the way to Romney, Jackson, because the harsh conditions were tearing down his army, stopped to regroup along the way at a location near Unger's Store.[12]

Before Jackson had moved to Unger's Store and while Jackson was camped across the Potomac from Hancock, Brigadier General Kelley sent a force of about 2,000 soldiers from Romney to attack a Confederate detachment at Hanging Rock. Hanging Rock was a mountain pass along the south route between Winchester and Romney. The Confederate force at Hanging Rock was slightly less than 1,000 and included Company F of Ashby's Cavalry Regiment. The Federals succeeded in driving the Confederates from the pass. Unknown to Jackson at the time, the attack was only a diversion planned by Kelley to draw Jackson away from Hancock by threatening Winchester.[13]

After less than a week of operations, the campaign was taking a heavy toll on Jackson's army. The combat casualties had been slight, four killed and twenty-eight wounded, but the casualties from the weather were staggering. Two of Loring's brigades had lost 800 men in total. Thirteen hundred of Jackson's men were sick in Winchester. Jackson's offensive appeared to have ground to a halt. In response, Jackson elected to spend several days at Unger's Store restoring his men, horses, and supply train.[14]

While consolidating his force at Unger's store, Jackson received the news that the Federals had driven the small Confederate force from Hanging Rock. Given the condition of his army and the dangerous position it was in if the Federals were making a concerted effort on

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Winchester, Jackson decided to split his command. He sent one militia brigade southwest to Moorefield and one militia brigade to occupy Bath. A small force of 200 infantry went to watch the Federals at Hanging Rock. In all, Jackson split 1,000 infantrymen from his force at Unger's Store. In addition, Jackson tasked the 7th Virginia Regiment to scout the region near Romney. The latest Confederate estimates on the size of the Federal force in Romney had reached 18,000.[15]

By 10 January, through a strange change of events, the bleak situation of Jackson's Romney expedition suddenly changed. While the majority of Jackson's army recuperated at Unger's Store, Jackson received unexpectedly good reports from the different areas in the Valley. First, Jackson learned that the Federal forces, which had moved on Hanging Rock, had withdrawn even before Jackson's men arrived. Second, two companies of the 7th Virginia had ridden into Romney on the tenth and found the town abandoned by the Federals. Jackson's sources had exaggerated the size of Federal forces in Romney. The actual size of the Federal force had been 5,000 to 6,000 thousand, not 18,000 thousand.[16]

A week after they arrived at Unger's store, Jackson's tired and frozen army achieved victory. A confused enemy gave the Confederates the objective of Jackson's winter campaign, Romney, without even a struggle. Operating with bad intelligence as well, the Federals evacuated Romney on the erroneous assumption that Jackson was marching on the town with a substantial force.

In response to this information, Jackson moved quickly to secure Romney. Troops immediately departed Unger's Store for Romney on the thirteenth. Jackson's infantry began to occupy Romney on the fifteenth.[17]

Despite the difficulties his army had overcome, no sooner had the Valley Army begun to flow into Romney than Jackson began to develop plans for attacking the Federals south of Cumberland, Maryland. Upon leaving Romney, Federal forces had concentrated near

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Cumberland. The poisoning of morale that was brought on by tired men, harsh winter weather, and an ever demanding and secretive Jackson reached critical proportions. The news of Jackson's intentions concerning the Federal position near Cumberland was not received well. Colonel Taliaferro, Loring's first brigade commander to enter Romney, told Jackson, in certain terms, that his men were in no condition to undertake a mission against Cumberland. Seeing the condition of the men and the state of their morale, Jackson abandoned the idea.[18]

After arriving in Romney, Jackson decided to place his army into winter quarters. Loring's command, along with a militia brigade, would remain in Romney. One militia brigade stayed in Bath, another militia brigade went to Moorefield, and the Stonewall Brigade moved to Winchester as the reserve. The cavalry was "distributed at various points along the northern frontier."[19]

Cavalry Operations

Even before Jackson's arrival in November, the Valley cavalry had been busy. This condition continued to prevail after Jackson assumed command. Throughout the Romney expedition, Ashby's cavalry played a central role.

Soon after Jackson arrived, Jackson directed consolidation of the cavalry outposts. Ashby, whose headquarters was just south of Martinsburg, conducted a continuous screen mission through a series of outposts. Jackson consolidated all of Ashby's command, except for Company F, along the northern portion of the screen. Captain Sheetz, commander of Company F, concentrated his company at Hanging Rock and conducted his screening operations from that location. In combination, the 7th Virginia screening operation covered a seventy-mile front, from Harpers Ferry in the east to Hanging Rock in the west.[20]

Throughout the Romney Expedition period, Ashby's outpost and screening mission continued without interruption. This operation provided early warning of enemy operations. In addition, the cavalry collected information on the enemy. The record is unclear on the estimates

provided to Jackson by his cavalry about enemy forces in Romney. However, the information

Jackson was receiving from non-cavalry sources overestimated the size of the enemy force in

Romney.

Ashby oversaw the cavalry screening operation directly. He routinely conducted rides

between the outposts, covering fifty or more miles in a fourteen-hour period. James Avirett, a

member of Ashby's staff, provides an accurate insight into the growing admiration of Ashby

among his men.

> The duty of keeping up and vigilantly attending to the extended line of outposts, in
> despite of the severity of the weather, was faithfully performed by Ashby in person, who
> never paused to inquire into the propriety of this or any other order received from his
> commanding officer. His duties were, at this time, very arduous, as he was too unselfish
> to impose upon others, any duty which he could perform himself. He seemed insensible
> to fatigue, and preferred performing the duties which would have taxed the energies of
> half a dozen ordinary men.[21]

By riding along the screen line, Ashby was able to consolidate his intelligence and encourage his

men. Ashby's leadership style required his company officers to take a primary role in leading

their companies. Ashby's own efforts provided his company commanders the opportunity to take

care of their commands and see to their men.[22]

Ashby led Jackson's December operations against Dam No. 5. In addition to the cavalry,

Ashby's operation included several companies from the Stonewall Brigade. The Federals

harassed the Confederates' first effort against the dam on the 8 December. Consequently,

Jackson directed Ashby to conduct another attack against the dam on the seventeenth. Over the

next four days, the Confederates succeeded in putting a small breech in the dam. However, the

Federals were able to repair the damage. Ashby's command, including Chew's Battery, played a

premier role. Chew's artillery succeeded in driving away the Federal soldiers who were shooting

at the Confederates destroying the dam from a position in the water. Chew's Battery, in addition

to driving off the Federal infantry, conducted several artillery duels with Federal artillery. By the

twenty-first, the Confederates abandoned their operation at Dam No. 5 due to a substantial build-up of Federal forces in the vicinity.[23]

As he prepared for his advance north towards Bath, Jackson ordered Ashby to conduct a flank guard mission. Ashby protected Jackson's right flank by returning to Dam No. 5. This third mission against Dam No. 5 provided security in two ways. First, Ashby's efforts masked Jackson's real interest in Bath. Second, the cavalry presence at the dam prevented Federal forces near Dam No. 5 from marching against Jackson's flank. From 1 to 2 January, Ashby continued to demonstrate against Dam No. 5 with his cavalry, Chew's Battery, and several companies of infantry. Simultaneously, Ashby's cavalry conducted their security operation on Jackson's west flank through their screening and outpost mission. Captain Sheetz, and his cavalry at Hanging Rock, conducted the western security mission.[24]

Jackson recalled Ashby from Dam No. 5 on the third. As Jackson advanced with his army from the south, Ashby advanced on Bath from the east. Avirett's account confirms that Ashby was unaware of Jackson's intentions in Bath. As Ashby crested the mountains east of Bath, he met an array of skirmishers. At first, the cavalry and the infantry of Jackson's army mistook each other as the enemy. Once the confusion was overcome, Ashby's force was among the first to enter Bath on the heels of the Federal withdrawal around dusk on the forth.[25]

Ashby and his men joined another company of cavalry from Loring's command in Bath. Colonel Baylor, of Jackson's staff, entered Bath with another company of cavalry. Jackson sent Baylor ahead of Loring's infantry due to Loring's slow advance. Ashby and Baylor's cavalrymen met Jackson in Bath, and Jackson ordered the cavalry to pursue the retreating Federals. The Federals, conducting a rear guard operation, were able to cross the Potomac into Maryland. Shortly after sunset, Ashby's cavalry cleared the remaining Federal cavalry from the woods along the Virginia side of the Potomac across from Hancock. Ashby conducted a charge against the remnants of the Federal cavalry. A well-timed volley from an ambuscade on the

Maryland side of the Potomac prevented the charge from continuing into Maryland. Ashby's men drove their enemy across the river, but did not capture them.[26]

On 5 January, Jackson sent Ashby into Hancock to demand the surrender of the town. Despite Jackson's threat to shell the town if the Federals did not withdraw, the Federals refused to abandon Hancock.[27] Jackson's order to shell Hancock came in the afternoon, and Chew's Battery helped to carry out the order.[28]

After Federal reinforcements arrived in Hancock, Jackson withdrew his army south on 7 January. As Jackson moved the main body of his army to the south, Ashby conducted a rear guard mission. The cavalry mission not only protected the army's rear but also to monitored Federal activity north of the Potomac. Before withdrawing south of Hancock, the cavalry collected supplies from the B&O depot at Hancock located on the Virginia side of the river.[29]

While the majority of Jackson's army engaged the enemy near Bath, the Confederates at Hanging Rock were also busy. As part of the Confederate force at Hanging Rock, Captain Sheetz and his company of cavalry was involved in the engagement. With a force of about fifty men, Captain Sheetz led a cavalry charge that drove back the Federal advance guard, the Federal Ringgold Cavalry Company. Upon the arrival of the Federal main body, the large Federal force forced Captain Sheetz to withdraw. Colonel Dunning, 5th Ohio Infantry Regiment, reported that they achieved victory with no losses and recovered seven Confederate dead, all infantrymen. Captain Sheetz' company escaped without serious injury.[30]

After learning about the events at Hanging Rock, Jackson sent Ashby to scout Romney. Acting on poor intelligence, the Federals mistook Ashby's scouting party, two companies strong, for a Confederate advance guard. Assuming Jackson was making a strong advance on the town, Kelley abandoned Romney. Ashby's men were the first Confederates to enter Romney and quickly secured it on 11 January. By 15 January, Loring's men began to enter the town. The Confederates had achieved their objective, Romney.[31]

Assessment of Cavalry Operations

Jackson's cavalry arm proved itself valuable and was critical to the success of Jackson's Romney expedition. The contribution of Jackson's cavalry centered on the performance of several missions. Included in these was an effective security operation that included a combination of screen and guard missions. Ashby's command also provided valuable information on Federal operations in the area through a network of informants and scouting operations. Finally, Ashby's command executed several miscellaneous missions that included raids on Dam No. 5 and facilities near Hancock.

Security Missions

The cavalry provided security to the Confederate army in a variety of ways. The cavalry conducted a screening and outpost operation throughout the period. Additionally, the cavalry provided security through execution of flank and rear guard operations. Among other things, Ashby's security operations supported Jackson's mission by keeping the Federals off balance and confused as to Jackson's true intentions.

The cavalry provided good security to the Confederate's flanks as Jackson moved his main body north to Bath. On the east flank, despite his activities at Dam No. 5 on 1 and 2 January, Ashby was able to move his force quickly into Bath. Even with its infantry and artillery, Ashby's force entered Bath before Loring's infantry brigades. The speed of Ashby's shift to Bath played a critical role in the pursuit that followed the Federals' abandonment of Bath. Had Ashby known earlier of Jackson's true intentions at Bath, he may have arrived earlier, thus preventing the successful withdrawal of the enemy. In his after action report, Jackson commended the cavalry charge conducted by Captain Harper of Ashby's command against the Federals as they retreated into Hancock.

After Jackson gave the order to withdraw south of Hancock, Jackson's cavalry successfully completed their rear guard mission. The cavalry prevented the Federals from

repositioning any forces south of the Potomac River while Jackson's army camped at Unger's Store.

The weakest part of the screen operation occurred at Hanging Rock. The failure at Hanging Rock was significant to Jackson's plans, but Captain Sheetz' company did not contribute to the failure there. The record shows that they represented themselves well in that operation. The failure at Hanging Rock falls squarely on the shoulders of the infantry force, a force outnumbering the Confederate cavalry by over a thousand.

Information Missions

In addition to security missions, the cavalry conducted information missions. Through its network of outposts, the cavalry performed the valuable function as Jackson's "eyes and ears." Although Jackson was misinformed about the size of the Federal force in Romney, there appears to be no evidence that the cavalry was the source of the exaggerated estimates.

Another information mission conducted by the cavalry during this phase was the scouting mission into Romney. Of course, this mission did not drive the Federals from Romney, but the audacity of Ashby's approach appeared to confirm Federal reports that Jackson was advancing upon Romney with a sizable army. Banks had directed the Union withdrawal from Romney based on intelligence reports that Jackson, with an army of 16,000, had designs on Romney and points further west. Once the Federals abandoned Romney, Ashby's cavalry acted quickly to secure the area and quickly reported their findings to Jackson.[32]

Miscellaneous Missions

As the Federal records indicate, the actual damage to the canal at Dam No. 5 was minimal. However, the cavalry played a significant role in any results achieved there. Chew's Battery drove off enemy soldiers and allowed Confederate volunteers to put a hole in the dam. In an operational sense, Ashby's role at Dam No. 5 effectively screened the Federals from Jackson's actual designs on Bath. Ashby's third mission against Dam No. 5 prevented Major

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General Nathan P. Banks from reinforcing the Bath and Hancock areas prior to Jackson's move against them.

Ashby's men also conducted miscellaneous missions around Hancock. Chew's Battery shelled the town. In addition, the cavalry collected supplies from the B&O Railroad depot.

<u>Final Thoughts</u>

From beginning to end, the cavalry played an important role in Jackson's Romney expedition. The cavalry executed each mission given it properly and efficiently. The lethargy that characterized Jackson's infantry was not apparent in Ashby's cavalry. When contrasted against the infantry, the Confederate cavalry's accomplishments are even more noteworthy. Jackson's after action report supports this conclusion, and included in it are several particular commendations of Ashby's cavalrymen.

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<u>Winter of Discontent</u>
(16 Jan 1862 – 20 Feb 1862)

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The primary event that occurred in the Valley during the winter was the decay of the morale of Jackson's army. In particular, Loring's Army of the Northwest, which had joined Jackson's effort in December, was in a "frenzy." The events surrounding this morale issue dominated the winter.

<div align="center">

Valley Army Operations

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The overall morale of the Valley Army and the relationship between Jackson and his subordinate commanders, particularly those of Loring's Army of the Northwest, did not improve after Jackson placed his army into winter quarters. In fact, the morale problem that surfaced in Romney had only begun to run its course. As soon as Jackson announced the decision to go into winter quarters, disgruntled men in Jackson's army began writing anyone who might be able to influence the situation to their way of thinking. As an example, Colonel Samuel Fulkerson who was the commander of the 37th Virginia Infantry Regiment, sent a personal appeal on the

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situation in Romney to his Congressman, Walter R. Staples. Included in that letter was another letter from a friend of Fulkerson, Brigade Commander Colonel William Taliaferro. Taliaferro's comments were typical of the language and demeanor of the correspondence from Jackson's men.

> The best army I ever saw of its strength has been destroyed by bad marches and bad management. It is ridiculous to hold this place [Romney]; it can do no good, and will subject our troops to great annoyance and exposed or picket duty, which will destroy them. Not one will re-enlist, not one of the whole army. It will be suicidal in the Government to keep this command here. For Heaven's sake urge the withdrawal of the troops, or we will not [have] a man of this army for the spring campaign.[33]

Taliaferro and Fulkerson were only several of the many voices that howled discontent.

The most significant confrontation occurred between Jackson and Loring. The complaints had an effect. The din grew loud enough in Richmond that the Secretary of War intervened. This intervention was due in part to a letter from Loring. In this letter, Loring explained that the forces in Romney were dangerously exposed to the enemy. This was an assessment that Jackson vehemently refuted. Other complaints from Congressmen also bombarded the Secretary of War. On the thirtieth, the Secretary of War ordered Jackson to withdraw his forces from Romney and consolidate them around Winchester. Jackson complied immediately and then promptly forwarded his resignation to General Johnston, his immediate superior. Johnston and others convinced Jackson, over the course of the next few days, to withdraw his resignation. Jackson did so but did not relent on seeking a reversal of the Secretary's withdrawal order. Johnston was unwilling to challenge the order from the Secretary. For his part, Loring submitted a letter of complaint, signed by twelve of his officers, up the chain of command to the Secretary of War. After this problem festered for several weeks, the Secretary ordered Johnston to intervene. Johnston ordered an inspector general to the Valley. On 7 February, Jackson initiated court martial proceedings against Loring. By this time, the

confrontation between Jackson and Loring had reached the desk of President Davis. The President directed that Loring's men be removed from the Valley.[34]

When the dust settled on 14 February, the organization in the Valley Army had changed considerably from what it had been in early January. First, Loring's command was on the way out of the Valley. Second, Jackson's command, now concentrated in Winchester, lost all the territory reclaimed from the Federal forces in the Romney expedition.[35] Third, still in command, the situation had badly damaged Jackson's reputation. (Jackson was the first Confederate to initial a court martial on a fellow general, but Jackson's court martial against Loring never convened.)

In concert with the actions of the officers, the enlisted soldiers in the army were acting on their frustrations as well. Many soldiers were merely "holding on" until the end of their enlistment. Thousands of others were reenlisting in order to secure the furlough guaranteed by the Bounty and Furlough Act. Jackson's winter campaign, after ordered to give back their hard-earned gains to the enemy, served more "to break the back and spirit of the army than increase its morale and efficiency."[36] In response to these organizational problems, Jackson curtailed the furlough rate to 30 percent. Unlike his other arms, however, Jackson's cavalry arm was growing. Even so, at the end of February, Jackson's army had only 5,400 effectives from a force that amounted to 13,800 on paper.[37]

Cavalry Operations

When given the order to go into winter quarters on 16 January, Ashby reestablished his headquarters in Martinsburg. Ashby continued to conduct his screening mission. To accomplish this, Ashby established a series of outposts and coordinated them with Jackson's infantry. The line of outposts stretched from a position near Harpers Ferry in the east across the western frontier to positions southeast of Moorefield in the west.[38] (See Figures 1 and 2.) Anchoring the eastern position of the line at Bolivar Heights, outside Harpers Ferry, was Ashby's horse

artillery, Chew's Battery. Captain Sheetz coordinated the western portion of the screen from his headquarters in Romney.

From 15 January until the Confederate withdrawal from Romney on the thirtieth, the 7th Virginia was busy conducting operations near Romney. Ashby had placed three companies of cavalry in Romney. These companies, under the command of Captain Sheetz, conducted small operations against the enemy. These operations provided valuable information to Jackson concerning the enemy in the region as well as capturing a few prisoners and numerous supplies.[39]

Jackson received the order to withdraw from Romney on 30 January. By the twelfth, the Federals had re-occupied Romney. After Jackson completed the consolidation of his infantry at Winchester, Ashby collapsed his ring of outposts because of the quick re-occupation of the region by the Federals. This new line remained the same in the East but was draw in toward the Allegheny Mountains in the West.[40]

On 14 February, the Federals surprised the Confederate infantry unit at Bloomery Gap, twenty-one miles northwest of Winchester along the road to Bath. This portion of Jackson's screen had been the responsibility of the militia. Jackson shifted this responsibility to Ashby, and Jackson directed Ashby to re-capture the area. Ashby successfully captured this position on the sixteenth, but the Federals maintained control of the territory to the north, including the portion of the B&O to the west of Hancock.

At this time, the cavalry outpost screen ran from southwest of Hanging Rock to Bloomery Gap to Harpers Ferry. Captain Sheetz secured the southern reaches of the cavalry screen, now headquartered at Hanging Rock. Ashby continued to secure the northern reaches of the cavalry screen from his headquarters in Martinsburg. The 7th Virginia would continue to hold this new security line through this phase of the campaign until it ended in late February.[41]

Assessment of Cavalry Operations

From the middle of January until 20 February, Jackson's army remained in winter quarters. During this time, Jackson's cavalry was not idle. The primary missions of the cavalry concerned the areas of security and information. It also conducted small engagements with Federal forces around Romney and a larger engagement with Federal forces at Bloomery Gap, reclaiming that position after the Confederate militia had been over-run. In addition to evaluation of these cavalry missions, assessment of the cavalry during this phase requires a discussion of several organizational issues.

Security

Ashby's cavalry executed a sound security mission, conducted through the outpost and screening mission, throughout this phase. The only breech in Jackson's screen occurred at a position in the line supported by militia infantry. In his mid-February operations report, Jackson commended Ashby on his prompt and successful repair of that breech.[42]

Information

Ashby's cavalry, under the command of Sheetz, won strong commendation for their actions in and around Romney. Sheetz' efforts provided valuable information to Jackson-- information that directly contradicted the negative conclusions Loring had included in the complaint he sent to Richmond. Jackson's words provide a clear assessment of Sheetz' activities: "To Captain Sheetz I am indebted not only for most reliable information respecting the enemy, for the prisoners from time to time captured, but for the extent to which he has armed and equipped his company at the expense of the enemy."[43]

Organization

Two aspects of the cavalry organization during this phase need consideration. First, it is necessary to address the issue of morale, as it existed in the cavalry. Second, it is also important to consider the growth of Ashby's cavalry during this phase.

In evaluation of the cavalry, it is important to contrast its activity in relation to the rest of Jackson's army. While most of Jackson's army complained about conditions and took furloughs, Jackson's cavalry remained steadfast in their duty. The problems and discontent in Jackson's infantry did not infect the cavalry. General Johnston had described the situation among Jackson's infantry as "a state of discontent little removed from insubordination."[44] In contrast, despite the conditions and the workload, the morale of Ashby's men actually improved through the winter.

The attitude of and morale in the cavalry was a direct result of the leadership of Ashby. James Avirett provides a good description of the attitude of Ashby during the winter of discontent.

> The lack of earnest co-operation [*sic*] which General Jackson experienced at the hands of a few of his subordinates, he had nothing to complain of in the bearing of Ashby. This officer was at all times ready to obey any order which came from his Superior, and this too, without the disparaging comment upon its wisdom or necessity, which goes far toward breaking down the *morale* [original emphasis] of any army in which it is indulged. No; Turner Ashby, if not a West-Pointer, was too good a soldier to do anything of this kind . . . he was too thoroughly imbued with the necessity of obedience, ever to do aught [*sic*]else than implicitly obey his ranking officer.[45]

While Loring and others complained bitterly and openly about their commander, Ashby focused his energies on executing his commander's guidance. The fact that the morale problems of Jackson's army are not recorded among the cavalrymen is testimony to Ashby's leadership.

While the morale and muster rolls of Jackson's army declined, the muster rolls of Ashby's actually grew. Ashby reported to Jackson on 7 February that his command had grown to fourteen companies. Ashby, still a lieutenant colonel, was acting commander of the 7th Virginia, but the permanence of that position had yet to be confirmed.

Although the rolls of the 7th Virginia grew, some of Ashby's men were hesitating to re-enlist upon rumors that Colonel McDonald would return to command the 7th Virginia in the

spring. Jackson ensured the men in Ashby's command that McDonald would not return to command the 7th Virginia.

In addition to this information from Jackson, Ashby received orders from the Confederate Secretary of War to organize his own command on 21 February. Ashby was unclear if, once a new command was raised, he would continue to command the 7th Virginia. Although Ashby would continue to recruit and organize both the 7th Virginia and his new command, the exact organization of the cavalry in the Valley was still uncertain. In spite of this organizational turmoil and uncertainty, Ashby's influence and credibility in the Valley continued to attract new recruits. By 20 February, Ashby's command included fourteen companies of cavalry and one battery of horse artillery.[46]

Conclusion

Throughout this phase of the campaign, the cavalry conducted their mission with distinction. Despite the organizational and morale problems faced by the Confederacy in general and Jackson's army in particular, Ashby had been able to provide an effective and energized cavalry arm. It is unlikely Jackson's army would have accomplished anything during this phase were it not for the efforts of the cavalry. For this period of the campaign, Ashby's cavalry played an important and valuable role for the Valley Army. Jackson recognized the efforts of Ashby in his operations report on 21 February: "I am under many obligations to this valuable officer for his untiring zeal and successful efforts in defending this district."[47]

Prelude to and Battle at Kernstown
(21 Feb 1862 – 23 Mar 1862)

Conduct of this phase of the Valley Campaign centered primarily along the axis of the Valley Pike. The Valley Pike was a north-south oriented road that bisected the center of the Valley. The first portion of this phase included a gradual withdrawal up the Valley by the Confederates, the Federals in close pursuit. The roles switched on 20 March when the

Confederates conducted an aggressive counter-pursuit of the Federals as they themselves attempted to shift their forces from the Valley in support of the primary Union campaign against Richmond. This phase of the Valley Campaign culminated in a fiercely contested battle in a small hamlet south of Winchester called Kernstown. (See Figures 4 and 5.)

Valley Army Operations

Before the initiation of the campaign in earnest in the spring, several important events transpired. In late February, Major General Banks advanced his forces south from Frederick, Maryland into Harpers Ferry, Charlestown, and Bunker Hill. In response to the actions of Major General George B. McClellan's growing threat near Washington, General Johnston began withdrawing his forces from Manassas and Centerville on Jackson's right flank on 9 March. Johnston withdrew most of his forces south to a position west of Fredericksburg. Johnston completed his withdraw by 11 March. Jackson's orders were to fall back as necessary to protect Johnston's right flank. While doing this, Jackson was required to maintain contact with Banks' army in order to prevent Banks from shifting most of his forces east to support McClellan's efforts there. As Banks' army flowed cautiously southward, Jackson began withdrawing his supplies further to the south. By 11 March, Jackson had begun to withdraw his forces from Winchester.[48]

On 16 March, McClellan began to move his army from its camps around Washington to Virginia's peninsula for the Union campaign against Richmond. In support of this effort, McClellan directed Banks to send most of his army east to Manassas while leaving only a small holding force in the Valley.[49]

By 20 March, the majority of Jackson's army had completed its withdraw up the Valley to Mount Jackson. Ashby's rear guard command, which included four companies of the Stonewall Brigade, was conducting the rear guard function. On the twenty-first, Ashby learned that the enemy had pursued no further south than Strasburg and were actually withdrawing north

to Winchester. Ashby quickly reported this information to Jackson. Jackson pounced on this news and directed Ashby to pursue the enemy aggressively back down the Valley. Ashby's cavalry closely pursued Banks' army northward, as far as Winchester. In the pursuit, the four infantry companies of Ashby's rear guard proceeded no farther north than Strasburg. The remainder of Jackson's army began marching north as well. The majority of Jackson's army reached Strasburg on the twenty-second.[50]

Banks underestimated Jackson's desire to attack. From the beginning, Jackson had been extremely reluctant to withdraw from Winchester. Jackson made several proposals to attack his enemy on different occasions as his army was withdrawing up the Valley. Jackson proposed an attack to his subordinates on the day after the Federals entered Winchester on 12 March. On the thirteenth, Jackson requested Johnston send Colonel Hill's garrison forces in Leesburg to Jackson in order to support Jackson in an attack against Banks. A letter from Johnston on the 19th encouraged Jackson to move north as well. "Would not your presence with your troops nearer Winchester prevent the enemy from diminishing his force there? It is important to keep that army [Banks] in the Valley, and that it should not reinforce McClellan. Do try to prevent it by getting as near as prudence will permit."[51] Given this suggestion by Johnston and the report by Ashby, Jackson acted quickly to take the offensive.[52]

Ashby and Major General James Shields, commanding Banks' 2nd Division, conducted an intense skirmish just south of Winchester at Kernstown on the twenty-second. Ashby's intelligence put the size of the Federal force in Winchester at four regiments. Based on that information, Jackson ordered his army north to Kernstown from its position in Strasburg.[53]

The Battle of Kernstown began on the morning of 23 March. (See Figure 4 and 5.) Unknown to Jackson, the intensity of Ashby's pursuit down the Valley actually encouraged Banks to delay the movement of a large portion of his force from Winchester. The actual size of Banks' force in Winchester was an entire division, not the smaller force reported by Ashby. As

history would show, Kernstown would place Jackson at a greater than two to one disadvantage. Shields, one of Banks' division commanders, would throw 7,600 men against Jackson's 3,200.[54] (See Order of Battle for Kernstown in Appendix C.)

The battle began at about 0900 hours on the twenty-third as a skirmish between Ashby's cavalry force and Shields' advance guard. Jackson began marching the rest of his army north from its position fourteen miles south in Strasburg. The first infantry forces to arrive in Kernstown were the four companies of Ashby's rear guard. They arrived at about 1000 hours. Shields ordered Brigadier General Nathan Kimble's brigade, one brigade of Shield's division, to advance on Ashby around 1100 hours. Kimble's brigade drove Ashby's men back to a position just southeast of Kernstown. The majority of Jackson's force did not arrive until about 1300 hours.

Jackson's initial intention had been to attack the enemy on the morning of the twenty-fourth. Jackson was well aware of the condition of his army after its two-day march from Mount Jackson, a total distance of forty-four miles. For several reasons, Jackson decided not to delay his attack. The most important of these reasons was the belief that Banks would reinforce those Federal forces now in the field.

The essence of Jackson's plan was to conduct flank attack on the enemy's right. (See Figures 4 & 5.) This plan failed for several reasons. Misunderstanding Jackson's order, Colonel Fulkerson initially moved his brigade due north and directly into the line of fire from a Federal battery positioned on Pritchard's Hill. Under heavy fire from these guns, Fulkerson's men eventually drifted further to the left--the real intent of Jackson's order. Reaching the woods west of the middle road, Fulkerson was surprised to encounter Union opposition in the form of Colonel Erastus Tyler's 3rd Brigade. These forces were in the woods to conceal them from their enemy. Colonel Fulkerson's Brigade continued to hold the Confederate left and prevented several attempts by the Federals to turn that flank. While Fulkerson's Brigade was holding the

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left, Brigadier General Richard B. Garnett of the Stonewall Brigade had had difficulty conducting his move to the left. Jackson's intent had been for Fulkerson and Garnett to move together. After a delay of nearly two hours, Garnett's Brigade arrived on Fulkerson's right in an extremely disorganized state.

In addition to the confusion among his subordinate commanders, Jackson realized he was experiencing stiffer resistance than he expected. At about 1600 hours, Jackson realized something was wrong. He sent Sandie Pendleton, a member of his staff, to reconnoiter the situation. Pendleton subsequently reported to Jackson that he estimated the size of the enemy force to be about 10,000. At that point, Jackson knew he was in trouble. His response to Pendleton's report, "Say nothing of it. We are in for it."[55]

After 1600 hours, the Federals began shifting forces from their left to reinforce their forces defending the Confederate attack on their right. Shields focused his efforts on the Stonewall Brigade, now positioned in the Confederate center. Over the next few hours, Jackson committed all of his reserves, Burks' Brigade, to hold off the enemy counter-attack on his center. As their ammunition ran low, Garnett decided to withdraw his brigade without consultation with Jackson. This withdrawal nearly became a rout. Gallant effort by elements of Garnett's Brigade and Burks' Brigade prevented the Federals from being able to capitalize on the situation. Major Funsten, commander of the Confederate cavalry that Jackson had put on the left flank, repulsed Federal cavalry sent into the battle to capitalize on the Confederate retreat. Darkness soon called an end to the day's fighting.[56]

Jackson began the withdrawal of his force from the field under the cover of darkness. The Federals had won the first major battle of the campaign. Despite the defeat, Jackson was able to maintain order as he withdrew.

The day's effort was not an entire loss. Jackson's tactical defeat at Kernstown was actually a strategic success. McClellan immediately reversed his order to shift Banks' Army

from the Valley. In addition, President Lincoln recalled McDowell's 30,000-man force to the area around Manassas. (McDowell had been in the process of moving south to join McClellan.) Jackson's effort at Kernstown achieved Johnston's intent, as provided in his letter to Jackson on 16 March.[57]

Cavalry Operations

When the Federals began to stir after the winter layoff, Ashby's cavalry screen was the first to observe that Banks was on the move. The Federal advance was not limited to Jackson's area of responsibility. The Federals were advancing across a wide front. Jackson's orders were to keep his army close enough to the enemy, without exposing himself to danger or defeat, to prevent the enemy from leaving the Valley to support McClellan. In support of this order, Ashby's cavalry became the main effort. Ashby continued to screen on the west, but he consolidated his effort in the north. A timid advance by Banks and an aggressive defense by Ashby slowed Banks' advance considerably. It took two weeks for Banks to advance his army twenty miles from Harpers Ferry to Bunker Hill, six miles north of Winchester. Initially with only one company of cavalry, Ashby sent Lieutenant Neff to hold back the Federal advance guard at Bunker Hill. Initially, Neff held back Banks' advance guard with only forty-five men. After a few hours, Ashby added two more cavalry companies and Chew's Battery to the engagement.[58]

On 9 March, Jackson began to withdraw from Winchester. As Jackson's main body began to move, Ashby's screen mission became a rear guard mission. From the eleventh until the twenty-first of March, Ashby led a rear guard operation that constantly harassed the enemy. So stiff was Ashby's resistance that Banks was under the impression that Jackson's force was much greater than it was. Banks was advancing with three divisions, 38,000 strong, against Jackson's small force of about 5,300. Holding the enemy at arm's length was Ashby's rear guard--three companies of cavalry, four companies of infantry and Chew's three-gun battery.[59]

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While conducting this rear guard mission, the cavalry still maintained a screen on the flanks. This screen covered the mountain passes between Strasburg and Moorefield in the West. This screen also covered the South Fork river crossings near Luray in the East.[60]

In addition to conducting the rear guard mission, Ashby's cavalry was collecting information on the enemy. Ashby was the first to learn that the Federals were stopping, and then reversing their advance, at Strasburg. Quickly alerting Jackson, Ashby's reversed his force and began conducting an advance guard mission against the enemy. Ashby, leaving his infantry in Strasburg, aggressively pursued the enemy with his cavalry to the outskirts of Winchester. From civilian sources in Winchester, Ashby learned that only four regiments of infantry defended Winchester. Based on this information, Jackson continued his army's advance down the Valley.

When the Battle of Kernstown began in earnest at 1100 hours, Ashby's force included 300 cavalry and four companies of the Stonewall Brigade. Initially, Ashby was able to drive in the Federal skirmishers but was forced to withdraw back down the Valley Turnpike just south of Kernstown before 1400 hours. This position was the Confederate starting point when Jackson commenced his full attack at 1530 hours.[61]

For the battle, Jackson split Ashby's cavalry between his two flanks. Ashby anchored the Confederate right flank throughout the battle. His small force included four companies (160 cavalrymen) and Chew's Battery. At the end of the battle, Lieutenant Thrasher conducted a company size charge that repelled an attempt by the Federals to turn Ashby's right flank.[62]

Major Funsten, with four companies of cavalry (140 cavalrymen), stationed on the Confederate left. Jackson held them on the flank until about 1630 hours when he recognized the true size of the enemy force. Jackson ordered Funsten to take a position in the rear of the left side of his line to prepare for a possible enemy charge. The enemy charge came at dusk, and Funsten's command repelled it with a counter-charge.[63]

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As Jackson's army left the field under the cover of darkness, the cavalry conducted the rear guard mission. Ashby's cavalry prevented any pursuit by the Federals. Behind the cavalry guard, Jackson was able to begin his retreat back up the Valley.

Assessment of Cavalry Operations

Cavalry activities in this phase centered on three primary mission categories. Security missions continued to dominate the campaign and ran the gambit of types. The cavalry also continued to conduct information missions for Jackson. As the pinnacle event of the phase, Jackson's cavalry conducted several battlefield missions.

Security Missions

In the month leading up to the Battle of Kernstown, Ashby conducted a well-executed combined arms rear guard operation. For the entire month, Ashby maintained constant contact with Banks' army. Through his efforts, Ashby confused Banks as to the actual size of the Valley Army.

Ashby was also quickly able to assess and react to Banks' withdrawal down the Valley from Strasburg. The cavalry's mission quickly evolved into an advance guard. However, even before Jackson reversed the direction of the main body, Ashby's quick identification and subsequent pursuit of Banks' rear guard prevented Banks from leaving the Valley entirely. Ashby's audacious pursuit matched perfectly his commander's intent to strike a blow at the enemy. As the records indicate, Ashby's aggressive pursuit led Banks to believe that his forces at Winchester were pursued by a larger force than they were.

Information Missions

Ashby's information about the size of the Federal force in Winchester was flawed. As Shields indicates in his after action report, he kept hidden from Ashby all but a third of his force. However, Ashby was aware that, before 1530 hours, the enemy was stronger than expected. Ashby and Jackson did not actually speak on the twenty-third. Jackson holds some responsibility

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for not ascertaining a more recent report (Ashby's estimate was twelve hours old) on the condition of the enemy before commencing the attack. Ashby, who had been engaged with the enemy since 1000 hours, who was busy executing Jackson's order to "threaten the enemy's front and right," should have taken measures to ensure the information about the changed situation was passed to Jackson.

Although Ashby's information about the size of the Federal force in Winchester was inaccurate, it is unclear the full impact this had on the battle. It is likely that Jackson would have changed some of the initial stages of the battle. However, it is unclear whether Jackson would have avoided the battle. Even before leaving Winchester a few weeks before on 11 March, Jackson was looking for an opportunity to take the offensive. Given Johnston's order to hold Banks in the Valley and his own desire for offensive operations, Jackson may have fought the Battle of Kernstown anyway.

This opinion is rooted in Jackson's actions during throughout this phase. In particular, one incident is particularly enlightening. Jackson had held a war council with his commanders on 11 March, the eve of their withdrawal from Winchester. In this meeting, Jackson expressed his desire to fight Banks at Winchester. His subordinates did not embrace Jackson's plan. Jackson accepted the results of the council and began his army's withdrawal. After the council, as Jackson was riding south along the Valley Pike in the dark with a member of his staff, Jackson expressed his frustration. The further south he rode the more upset he became. Jackson vented his frustrations with a member of his staff, Doctor McGuire and stated, "That is the last council of war I will ever hold."[64] It was.

Given Jackson's strong desire to reverse his march and take the offensive, in combination with Johnston's order to stall Banks' movement east, it is uncertain whether Jackson would have avoided battle at Kernstown. This does not absolve Ashby of his own failure to

communicate the change in enemy disposition. Rather, the war council event merely clarifies the state of mind of Jackson.

In any event, Jackson made no mention of dissatisfaction with Ashby's information in his after action report. The information blunder did not seem to affect Jackson's view or use of cavalry. Jackson never makes anything of it.

Battlefield Missions

In execution of the battle, Ashby's ability to hold the Confederate right with such a small force is commendable. Captain Chew, who was in a position to observe Ashby directly, gave high praise for Ashby's actions in the battle. "I have always believed that his audacity saved Jackson's army from total destruction at the Battle of Kernstown."[65] Jackson's comments on the role of the cavalry in the battle also support the conclusion that the cavalry proved invaluable to the Confederate effort that day.

> During the engagement Colonel Ashby, with a portion of his command, including Chew's Battery, which rendered valuable service, remained on our right, and not only protected our rear in the vicinity of the Valley turnpike, but also served to threaten the enemy's front and left. Colonel Ashby fully sustained his deservedly high reputation by the able manner in which he discharged the important trust confided to him.[66]

Major Funsten's counter-charge was well executed and prevented the retreat of the Stonewall Brigade from becoming a rout.

At the time of the battle, Ashby's regiment numbered about 600. Only 300 participated in the actual battle. Upon request, Ashby explained why he had been unable to put more cavalry in the field. Ashby's command operated across a wide front. In addition, the condition of many of the men's horses had deteriorated over the month of skirmishes and they were not prepared for battle. Ashby also expressed to Jackson his ignorance of Jackson's intention to attack on the twenty-third. His report to Jackson on this issue indicated he anticipated the battle for the twenty-fourth, at the earliest. More cavalry would have been available if the attack had taken place on 24 March.[67]

Conclusion

For this phase of the campaign, Ashby's cavalry performed with distinction. They executed all of their missions to near perfection. The lone blemish involves the information about the size of the enemy in Winchester on 22 March. Throughout the campaign, the cavalry consistently participated in the critical events. Ashby had been the leader of all three missions against Dam No. 5. Ashby and his cavalry preceded Loring's infantry into Bath despite their third mission to Dam No. 5. The cavalry had driven back the enemy from Bath to Hancock, Maryland. Ashby's men were the first to enter Romney and conducted numerous scouting missions in that region before their directed withdrawal. Throughout the winter, the 7th Virginia remained attentive to its duty, in stark contrast with much of the rest of Jackson's army. Ashby's men executed a strong rear guard operation following the Confederate withdrawal from Winchester on 11 March. Ashby's quick pursuit of the Federals back down the Valley ensured that Jackson was able to achieve the Confederate's intent concerning Banks' departure from the Valley. On the battlefield, Jackson's cavalry played a decisive and influential role as well.

Another source of the strength of the 7th Virginia's performance during this phase is provided by their antagonists. Following the Battle of Kernstown, several Federal reactions were recorded. "Letters received from Winchester last night, from reliable persons, state that there is 'no exultation among the Yankees, and that they look upon Jackson's army as a band of heroes.' The same letters represent the Yankees as looking upon Jackson's army, particularly Colonel Ashby's cavalry with fear and trembling."[68] Among both sides of the conflict in the Valley, in no small part to the leadership of Ashby, the reputation of the Confederate cavalry was growing.

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[1] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 5, 940. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted).

[2] *OR*, vol. 5, 935-937. Note: Accordi͟n͟ Union records the actual number of Union forces in Romney was closer to 2,500 (*OR*, vo͟l ͟, 636).

[3] *OR*, vol. 5, 937.

[4] *OR*, vol. 5, 935, 938.

[5] Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 63; and *OR*, vol. 5, 939.

[6] *OR*, vol. 5, 389, 390, 397.

[7] Tanner, 65; and *OR*, vol. 5, 1004.

[8] *OR*, vol. 5, 1004; and Tanner, 68-69.

[9] *OR*, vol. 5, 389-392; Tanner, 69-73; and David Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1995), 20-21.

[10] Martin, 21.

[11] George M. Neese, *Three Years in the Confederate Horse Artillery* (New York: Neale Publishing Company, 1911), 15.

[12] *OR*, vol. 5, 392.

[13] *OR*, vol. 5, 403.

[14] Tanner, 73,74; and *OR*, vol. 5, 392.

[15] *OR*, vol. 5, 403-404; and Tanner, 75.

[16] *OR*, vol. 5, 390-392.

[17] *OR*, vol. 5, 392-294; and Tanner, 76.

[18] *OR*, vol. 5, 1039.

[19] *OR*, vol. 5, 1040.

[20] James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 132.

[21] Avirett, 136.

[22] Avirett, 137.

[23] *OR*, vol. 5, 390; Avirett, 133-135; and Neese, 9-11.

[24] Avirett, 135-138; and Neese, 12.

[25] *OR*, vol. 5, 392; Avirett, 141-142; and Neese, 15.

[26] *OR*, vol. 5, 391.

[27] Jackson's willingness to shell the town was two-fold. First, Federal forces had shelled Shepherdstown even though there were no Confederates in the town. Second, Federal forces chose to use the civilians in Hancock as a "shield" rather than leave the town (*OR*, vol. 5, 390).

[28] Neese,16.

[29] *OR*, vol. 5, 392; and Neese, 19.

[30] Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg,VA: H. E. Howard, Inc., 1992), 19; and *OR*, vol. 5, 404-405.

[31] *OR*, vol. 5, 393.

[32] *OR*, vol. 5, 697.

[33] *OR*, vol. 5, 1042.

[34] *OR*, vol. 5, 1045-1071.

[35] Immediately after the Confederates consolidated their forces in Winchester, Federal forces reoccupied Romney. The Federals expanded even further south and secured Moorefield by mid-February.

[36] Martin, 25.

[37] *OR*, vol. 5, 1069, 1086.

[38] *OR*, vol. 5, 1026. (56 Hanging Rock, 50 North River Mills, 56 Martinsburg, 60 Shepherdstown, 26 Duffifeld's Depot, 375 Unger's Store); and Neese, 20-22.

[39] *OR*, vol. 5, 393.

[40] Neese, 20-22.

[41] *OR*, vol. 5, 395, 405; and Avirett, 153.

[42] *OR*, vol. 5, 395.

[43] *OR*, vol. 5, 393.

[44] *OR*, vol. 5, 1065.

[45] Avirett, 148-149.

[46] Armstrong, 20.

[47] *OR*, vol. 5, 393.

[48] *OR*, vol. 5, 735, 1087.

[49] Martin, 37.

[50] Tanner, 112, 119.

[51] Tanner, 119

[52] Tanner, 108; and *OR*, vol. 5, 1098;

[53] *OR*, vol. 12, part 1, 385.

[54] Martin, 204.

[55] *OR*, vol. 5, 379-382; and Tanner, 132.

[56] *OR*, vol. 12, part 1, 380-384; Martin, 45-51; and William Allen, *Stonewall Jackson, Robert E. Lee, and the Army of Northern Virginia* (New York: Da Capo Press, 1995), 46-53.

[57] Tanner, 119; and T. Harry Williams, *Lincoln and His Generals* (New York: Vintage Books, 1952), 82.

[58] *OR*, vol. 5, 1080; Allan, 34; and Avirett, 155.

[59] Allan, 40.

[60] Tanner, 118.

[61] *OR*, vol. 5, 385.

[62] *OR*, vol. 5, 385.

[63] *OR*, vol. 5, 387.

[64] Tanner, 110.

[65] Charles L. Dufour, *Nine Men in Gray* (Lincoln, NE: University of Nebraska Press, 1993), 61.

[66] *OR*, vol. 5, 383.

[67] *OR*, vol. 5, 385.

[68] John E. Cooke, *The Life of Stonewall Jackson* (Freeport, NY: Books for Libraries Press, 1863), 79-80.

CHAPTER 5

SLOW WITHDRAWAL AND SWIFT ATTACK

> Though the field is in possession of the enemy, yet most the essential
> fruits of the battle are ours.[1]
>
> Major General Thomas J. Jackson, *Official Records*

Major General Thomas Jackson penned these words in his after action report on 9 April

1862. Despite the tactical outcome of the battle, Jackson understood the strategic level

consequences that would follow. Somehow, even in defeat, Stonewall was victorious.

On a tactical level, the Battle of Kernstown was a Confederate defeat; the Federals

successfully drove Jackson's army from the field and forced the Confederates to retreat from

Winchester and withdraw up the Valley. Yet, as Jackson's epigram comment indicates, not all of

the consequences of the Battle of Kernstown were negative.[2]

Consequences of the Battle of Kernstown

On a strategic level, Jackson's bold attack at Kernstown was a victory. General Joseph

E. Johnston's intent was for Jackson to prevent Union Major General Nathaniel P. Banks from

repositioning his forces east of the Blue Ridge Mountains. From there, Banks' army could

directly support Union General George B. McClellan's campaign for Richmond. Jackson's

execution of the Battle of Kernstown achieved Johnston's intent. Because of the battle,

President Lincoln recalled Banks' entire army, which had already begun its transfer east. The

recalling of Banks' army to the Valley provided the Confederates a strategic victory.

The "essential fruits," as Jackson describes them in his after action report on 9 April, are

the elements of the Confederates' strategic success. The essential fruits are twofold. First,

Union soldiers were withheld from the Federal campaign against Richmond. Second, President

Lincoln changed the organization of the Federal armies operating in Virginia.

In his orders to Banks following the battle, General McClellan, after Lincoln order him

to, directed Banks to delay his departure from the Valley and to use his force to drive Jackson up

the Valley.

> In regards to your own movements, the most important thing at present is to throw
> Jackson well back and then to assume such a position as to enable you to prevent his
> return.[3]

In addition, President Lincoln prevented Major General Irwin McDowell's force, operating near

Washington, from reinforcing McClellan in the south.

Even more significant, President Lincoln reorganized the structure of Federal forces

operating in Virginia. Before the Battle of Kernstown, Lincoln created a new department in

Virginia. This region was the Mountain Department and included the area of Virginia west of

the Allegheny Mountains. This area of Responsibility (AOR) was a portion of McClellan's

original AOR. After the Battle of Kernstown, Lincoln carved up two additional AORs from that

portion controlled by McClellan. The Shenandoah Valley became the Military Department of

the Shenandoah. A portion of northern Virginia, east of the Blue Ridge Mountains, became

another AOR. This AOR was the Department of the Rappahannock. The remaining AOR was

southern Virginia, including the area of Richmond.[4]

After Kernstown, the command and control of Federal forces operating in each of these

areas fell on the shoulders of four generals. Lincoln and Secretary of War Stanton were

responsible for coordinating the efforts among these AORs. Not only did McClellan forfeit the

geographical area of these new AORs, McClellan also relinquished the forces necessary to

conduct operations in the new Shenandoah and Rappahannock Departments. Major General

John Frémont commanded Federal forces in the Mountain Department. Major General Nathaniel

Banks commanded Federal forces in the Shenandoah Department. Major General Irwin

McDowell received command of forces operating in the Rappahannock Department. The

remainder of the Federal forces operating in Virginia remained under control of General

McClellan. Before the Battle of Kernstown, McClellan had been directing all of these forces, except those in Frémont's army.[5]

For the remainder of the Valley Campaign, the Federal forces operating in each of these AORs pursued different operational objectives. Coordination of each of these efforts proved difficult for the Lincoln and Stanton. As the campaign progressed, Jackson exploited this new organizational structure and its management to the Confederate's advantage.

<u>Introduction</u>

After their defeat at Kernstown, the Confederates initiated a gradual withdrawal up the Shenandoah Valley. This withdrawal continued through the end of April. However, even as Jackson withdrew, he was actively seeking an opportunity to retake the offensive. Throughout April, Jackson requested additional soldiers for his army for the sole purpose of attacking his enemies. The month long withdrawal concluded at the end of April. Jackson's army was camped at Conrad's Store with a small toehold in the Valley. If he retreated any further, Jackson would lose the Valley.[6]

At the end of April, the Federals were inching their way into Harrisonburg. From his defensive position at Conrad's Store, Jackson's army prevented Banks' advance further south by posing a threat to Banks' flank.

After a month of gradually surrendering the Valley to his foes, Jackson had not given up on offensive operations. Stonewall had reorganized his army and all he needed was some support from Richmond to take the offensive. Jackson got the resources he needed. Major General Richard S. Ewell joined Jackson's army at the beginning of May, and General Robert E. Lee, acting as Confederate President Davis' military advisor, encouraged Jackson to take the offensive.

Despite the precarious situation in the Shenandoah Valley, Jackson began offensive operations the very day Ewell arrived, 30 April. This offensive effort, after a week of

maneuvering, resulted in the Battle of McDowell. In that battle, Jackson defeated Frémont's advance guard that was threatening the Valley from west of the Alleghenies. In addition, Jackson capitalized on Federal misconceptions about his activities. By the middle of May, Federal forces in the Valley were concentrated at Strasburg and Jackson was pursuing them with vigor.

This chapter will focus on the period from 24 March 1862, the day after the Battle of Kernstown, through 15 May 1862. Before analyzing the particular cavalry actions of this phase, a brief discussion of several essential organizational and logistical issues is necessary. This brief discussion will build on the background information provided in chapter 3 by providing additional specific information particular to this phase of the campaign. The format for the remainder of the chapter is similar to that of chapter 4 and includes three major subject areas: Valley Army operations, cavalry operations assessment of cavalry operations.

To simplify the analysis, the period under evaluation in this chapter is divided into three chronological "slices." Each of these slices will evaluate each of the three subject areas. The first chronological portion will consider the first phase of the Confederate withdrawal up the Valley following the Battle of Kernstown, 24 March 1862 to 15 April 1862. The second portion will consider the second phase of the Confederate withdrawal up the Valley to Conrad's Store, 16 April 1862 to 29 April 1862. The final portion of this chapter will consider the beginning of Jackson's offensive operations in the Valley, 30 April 1862 to 15 May 1862.

Organizational and Logistical Issues

In terms of organization and logistics, several events transpired during this phase of the campaign. Because these events directly affected Confederate operations throughout this entire phase of the Valley Campaign, the discussion of these events is necessary at this point. Only the most significant issues will be identified here.

The manpower shortages in the Confederacy that had begun in December, because of the Bounty and Furlough Act, continued through the middle of March. Several events took place that reduced these shortages. Because of its effect on manning levels, General Johnston directed Jackson to mitigate the negative effect of the Bounty and Furlough Act by restricting the number of soldiers who could take a furlough at any one time. This step did not stop the downward trend, but it did reduce the rate of decline. Before mid-March, this was all that could be done.

In Virginia, the conscription proclamation of Governor Letcher on 12 March began the process of reversing the downward trend in manpower. "Authority is hereby given to the Confederate generals commanding within the limits of Virginia to call for such militia as are within the bounds of their commands, and muster them into service, to meet any public exigency."[7] Under this directive, Jackson acted quickly to muster into service able-bodied men living in the Valley. Prior to the Battle of Kernstown, Jackson had been able to stem the tide. Some men joined the army before the Battle of Kernstown, but even more men joined after the battle.

The combination of Letcher's proclamation and the growing threat to Virginia worked together to get more men to join the army. Jackson exploited, for the benefit of Virginia, the proclamation of its governor and the patriotism of its people. Throughout this entire phase of the campaign, Jackson continued to muster militia into his army. The cavalry was particularly successful in recruiting. By mid-April, Ashby's command had grown to over twenty companies.[8]

From December through April, the Confederate Congress also took several steps to address the critical manpower shortages of the Confederate Army, beginning with the Bounty and Furlough Act in December and ending with the Conscription Act in April. In between, several additional initiatives were taken regarding manpower. These actions, in concert with the individual actions of each of the Confederate States, created a "volunteer system as complicated as it was uncertain."[9] The confusion did not end once the Conscription Act became law. For the

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remainder of the Valley Campaign, numerous organizational problems stemmed from the varied and complicated legislative actions of the states. These problems were not isolated to the actions of the different legislative bodies. Legal challenges to these laws further complicated the situation.[10]

Although the South was able to muster men into the army, the confusion surrounding the numerous and varied methods used to muster these men created leadership problems. Some units choose their officers. In other units, President Davis appointed the officers with Congressional approval. The officer selection method depended on how the unit was formed--volunteer, militia, or conscript. Within the Valley, officer appointments were slow. Because of these problems, within the 7th Virginia Cavalry, many officer positions remained unfilled until after the campaign.[11]

The turmoil within the organizational structure of the army complicated the logistical aspects of the operation as well. Particularly in the spring of 1862, organizational turmoil hampered efforts to get arms to the soldiers in the field. Many states were concerned about what would happen to weapons in state militias when those units became Confederate units. This transformation occurred in many units after the passage of the Conscription Act. Many states initially withheld weapons from the field for fear that ownership of those weapons would pass to the Confederate government and not revert to the state government.[12]

Although the Confederate government eventually developed efficient and capable armament production, such was not the case in the Spring of 1862. The Secretary of War reported to Congress in April of 1862, that it was unlikely, given the current conditions, that the Confederacy would ever be able to exceed one-tenth of its small arms needs. The cavalry, including the 7th Virginia,[13] keenly felt the shortage of small arms.[14]

Through this phase of the campaign, Jackson's army was critically lacking in weapons. The problem was so acute that Jackson made a request for 1,000 pikes in April because more

than 1,000 of his men had no weapons. Corporal George Neese, of Chew's battery, recorded in his diary an incident where he observed a company of Ashby's cavalry carrying homemade lances. Throughout the campaign, both Jackson and Ashby made numerous requests for arms from Richmond. Over the course of the campaign, both men would succeed in securing from the Federals what they could not obtain from Confederate ordnance arsenals.[15]

Organizational and logistical problems continued to challenge the Valley Army. Despite these challenges, Jackson was able to succeed. Nonetheless, the evolution of the organizational nature of the Confederacy and the growing pains of equipping such a large army directly affected operations in the field. As the campaign review continues in more detail, it is important to keep these factors in mind.

First Phase of the Withdrawal from Kernstown
(24 March – 15 April)

The Confederates conducted this phase of the campaign as a gradual withdrawal up the Valley. The withdrawal occurred in two movements. The first movement took place in the first few days after the Battle of Kernstown. In this movement, Jackson's main force moved to Rude's Hill. The second movement began on 17 April. In this movement, Jackson's main force moved to Conrad's Store. This portion of this chapter's campaign analysis will concentrate only on the first portion, the withdrawal to Rude's Hill.

At the beginning of April, General Johnston directed Jackson to withdraw his army from the Valley via Swift Run Gap if Banks began to threaten Jackson's army severely. At the beginning of April, Major General Ewell, whose force was guarding the western flank of the Confederate line in the Potomac District, was positioned along the Rapidan River near Fredericksburg. If Jackson withdrew, General Johnston directed Jackson to join forces with Ewell and engage the enemy in such a fashion as to protect the Confederate rail station at

Staunton, preventing it from falling into Federal hands. Jackson began developing a plan to counter the eventuality of a significant advance by Banks as early as 10 April.[16]

<center>Valley Army Operations</center>

The morning after the Battle of Kernstown, Jackson began his withdrawal. Following the battle, McClellan directed Banks to secure Strasburg and to attempt to drive Jackson at least as far as Woodstock. (See Figures 1 &2.) For his part, Jackson continued his advance south to a position south of Woodstock.

During their withdrawal, the Confederates crossed Cedar Creek. This creek runs across the Valley Pike near Strasburg. Upon reaching the south side of Cedar Creek, the rear portion of Jackson's retreating infantry force broke ranks and had its first meal in twenty-four hours. While the infantry rested, Chew's Battery, which was conducting the rear guard mission as a part of Ashby's cavalry, established a position on the south side of Cedar Creek as well.

Chew's Battery withdrew to this position because of the appearance of Federal cavalry in the Federal advance guard. At this point, Ashby's cavalry was between the Federal advance guard and Chew's Battery.

Federal artillery, which was also moving with its advance guard, fired several shells at Chew's Battery. These shells went long and landed amongst the resting Confederate infantry, creating a panic among the Rockbridge Rifles, the infantry unit affected. The infantry fled up the Valley Pike, leaving some of its equipment and casualties behind. This incident occurred at 1430 on 24 March. From that point on, the distance between the Federal advance guard and the main body of the Confederate Army began to open.[17]

By 26 March, the majority of Jackson's main body was between Woodstock and Mount Jackson. Although Banks consolidated his army near Strasburg, Jackson continued his withdrawal up the Valley to Mount Jackson. Using the Massanutten Mountain to protect his east flank, Jackson placed the North Fork of the Shenandoah River across his front in order to provide

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a strong defensive position for his army. At this time, the North Fork was swollen with spring

rains and was not fordable. For this reason, Jackson e   ed to take up a defensive position at

Rude's Hill and stop his withdrawal. Jackson's main body positioned itself at Rude's Hill on 31

March.[18]

Banks pursued Jackson with his characteristic caution. Jackson's main force was south

of Woodstock before Banks moved into Strasburg on 29 March. By the time Jackson moved

across the North Fork near Mount Jackson on 31 March, Banks' advance guard was moving into

Woodstock. Since the day after the Battle of Kernstown, Jackson's cavalry, under Ashby's

direct supervision, maintained constant contact with Banks' advance guard. For the first two

weeks of April, Banks' advance guard remained in Woodstock. The remainder of Banks' army

concentrated around Strasburg. During this two-week period, Banks made no further advance up

the Valley.[19]

After Banks' advance guard arrived in Woodstock, Jackson's cavalry positioned along

Stony Creek, ten miles north of Rude's Hill. For the next two weeks, Ashby's force skirmished

with the advance guard of Banks' army. In addition to Ashby's cavalry, Jackson rotated one

infantry brigade with artillery support to the front every three days. This artillery battery, along

with Chew's battery of the 7th Virginia, exchanged fire with the Federals on nearly a daily

basis.[20]

Cavalry Operations

The Valley Army began its organized withdrawal from positions south of Kernstown

midmorning of 24 March. Dr. Hunter McGuire, Jackson's chief surgeon, expressed concern to

Jackson on the morning of 24 March that the army would have to leave some of the wounded

behind because of a lack of transportation. To Jackson, this recommendation was unacceptable

and Jackson ordered the cavalry to delay any Federal advance until McGuire completed the

evacuation. This, the cavalry did. The cavalry rear guard operation also allowed Jackson to withdraw his infantry from contact with the enemy and start them up the Valley.

The 7th Virginia was solely responsible for the rear guard operation. It is important to remember that Chew's Battery was a part of the 7th Virginia. Using the combined arms of cavalry and artillery, Colonel Ashby constantly harassed the Federals. Captain Chew described Ashby's tactics this way. "He (Ashby) would form a skirmish line and open on them with artillery, compel them to halt and form line of battle. When their superior forces drew dangerously near to his men, he would skillfully withdraw over the next hill."[21] Chew's Battery played an equal role in Ashby's tactics. Always keeping his cavalry between his artillery and the enemy, Ashby used Chew's Battery in his hilltop to hilltop fight. While the cavalry repositioned, Chew's Battery continued to fire on the advancing Federals.

Using these techniques, Ashby and the 7th Virginia were able to keep the Federals at arm's length and away from Jackson's main body. However, at one point, the distance between the Federals and Jackson's main body collapsed significantly. This occurred at Cedar Creek on the afternoon of 25 March. On this occasion, the close proximity of the Rockbridge Rifles to Chew's Battery allowed a poorly aimed Federal barrage to fall on the unsuspecting Confederate Infantry. At that moment, Federal cavalry were preparing to charge Chew's Battery. Ashby's cavalry thwarted the Federal charge with their own preemptive charge.[22]

The main body of Banks' army entered Strasburg on 29 March. At this time, the range between the main bodies of the two armies was twenty-four miles. Jackson's main force was in Mount Jackson. Ashby's cavalry held Banks' advance guard outside Woodstock.[23]

Banks' advance guard, which stalled around Woodstock, reasserted itself on 1 April and forced the 7th Virginia to withdraw five miles south of Woodstock to the Stony Creek line. The 7th Virginia kept Banks' advance guard north of Stony Creek. The Federal advance guard remained stalled at this point for over two weeks.

Although the majority of Ashby's cavalry was engaged in the rear guard operation, the 7th Virginia continued to provide additional security for Jackson's army through a screening and outpost mission. Ashby's cavalry conducted security operations between the Alleghenies and the Blue Ridge, across a thirty-mile front. The rear guard operation provided security in the middle of this front. Conduct of the screening and outpost mission provided security on the wings of this wide front.

As a part of their rear guard operation, Ashby's men also executed the miscellaneous mission of bridge burning as they withdrew up the Valley. Not only did the 7th Virginia destroy bridges along the Valley Pike, but numerous bridges across other creeks and waterways in the Valley were destroyed as well.[24]

Ashby's activity along Stony Creek was not defensive in nature. He actually sought out the enemy and kept him off of balance. He probed the Federal picket line and engaged the enemy. Captain James B. Avirett, a member of Ashby's staff, described Ashby's tactics in his book, *Ashby and His Compeers*: "To-day he would use his artillery altogether from the crest of the hills on the left; perhaps he would so the same thing tomorrow. The next day he might fight them altogether from the hill-tops on his right."[25]

In addition to their security mission, the 7th Virginia simultaneously conducted information missions. On 15 April, a company of the 7th Virginia conducted a screen penetration that reached a point within six miles of Winchester. Ashby's men captured several prisoners and brought them south. These prisoners subsequently provided valuable information to Jackson about Banks' intentions.[26]

The cavalry also conducted scouting missions as another means to collect information. A particular set of scouting missions was extremely important to the campaign. On 26 March, Jedediah Hotchkiss joined Jackson's staff as a cartographer, and the cavalry routinely conducted scouting missions with Hotchkiss allowing him to gather the necessary information for the

creation of his maps.[27] These forays began as Jackson retreated up the Valley and continued throughout the remainder of the campaign.[28]

Assessment of Cavalry Operations

The primary mission of the cavalry during this phase was security. The cavalry also conducted some miscellaneous missions as well. This assessment will cover each of these mission areas. Some discussion is also needed in the cavalry organization area as well.

Security Missions

Ashby's security mission was an amazing accomplishment. Because of its rear guard operations, Ashby's cavalry allowed Dr. McGuire sufficient time to evacuate all of the wounded--an event which was not completed until late morning. After the Battle of Kernstown, the actions of the 7th Virginia bought Jackson valuable time to rest and reorganize his main force. This security mission began the morning after the Battle of Kernstown and continued continuously through 15 April.

The cavalry maintained constant contact with the enemy. Initially facing Shields' division of 8,000, Ashby's rear guard operation was holding back, within a week, roughly 18,000 of Banks' 23,000-man army. For over two weeks, the 7th Virginia secured Jackson's main force from Banks' army.[29]

While Jackson's infantry rested and reorganized, the 7th Virginia fought with the enemy almost daily. Through 15 April, Ashby and his cavalry skirmished with the Federals more than thirty times in twenty-one days. This operations tempo continued through the remainder of this phase of the campaign.[30]

The only infantry support utilized for security throughout this phase of the campaign occurred during the two-week period along the Stony Creek line. Of course, the infantry brigade and artillery battery sent to support Ashby's screen contributed to the success of that screen.

However, the primary purpose of this support was to allow the infantry to conduct training and observe Ashby in action.[31]

Robert Tanner, a noted Jackson expert, harshly criticizes the cavalry about their activities on several occasions. One of those involves an incident at Cedar Creek. It is important to discuss that issue here.

Tanner faults the cavalry for the incident at Cedar Creek. In that case, an errant artillery barrage landed amongst a resting infantry unit. According to Tanner, "It was the cavalry's role to provide a proper cushion between the Union advance and the army's rear, and in this Ashby failed." The first portion of Tanner's statement is true, but a thoughtful assessment of the facts does not affirm Tanner's conclusion.[32]

In this case, is the cavalry responsible for the fact that an artillery shell landed amongst Jackson's infantry? Was the rear guard mission being conducted properly at the time of the incident? Why was the cushion between the rear guard and the main body so thin? To settle this issue, these questions should be answered.

Why was the cushion between the rear guard and the main body so thin? As is typical of a rear guard operation, the movement of the opposing forces is not constant. At the time of this incident, the pace of the Confederate withdraw was accelerated as a result of the activity of Federal cavalry that were just then added to Banks' advance guard. Ashby's force, specifically Chew's battery was driven back. However, the Rockbridge Rifles were partially responsible for the collapse of the cushion because they stopped moving. After the arrival of Chew's Battery, they should have reinitiated their own movement.

Was the rear guard operation being conducted properly? At the time of the incident, Ashby's cavalry was holding back a force more than twice its size. Ashby's preemptive cavalry charge against the Federal cavalry that was preparing to charge Chew's Battery succeeded in driving the cavalry back. Ashby's rear guard was not penetrated. Had the Federals been able to

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penetrate Ashby's line, Tanner's assessment would be proper. In this case, because the Federal penetration failed, the Confederate cavalry's mission was properly conducted.

Withdrawals under contact are dangerous operations. The rear guard should not be held accountable for an enemy artillery barrage that falls amongst unengaged forces that are resting close to an ever-collapsing battle line. As the records show, the Federals were unaware of the exact location of Jackson's infantry. The quick reaction of the cavalry to the newly arrived Federal cavalry prevented the loss of their artillery battery and a successful penetration of their rear guard.[33]

Miscellaneous Missions

The cavalry performed two primary miscellaneous missions in this phase, each was completed successfully. These missions included the forays with Hotchkiss and the burning of bridges across the Valley. The latter mission contributed to the slow advance of Banks' army.

Organization Issues

During this phase, Ashby was having difficulty arming his growing command. Tanner criticizes Ashby for failing to secure arms for his men and notes, "Certainly his role as a combat leader provided little time to grapple with requisitions, although more probably Ashby did not comprehend enough of military bureaucracy to know he must pursue them tirelessly."[34] However, during March and April, Ashby made no less than three documented attempts to gain supplies for his men. During this same period, moreover, Jackson himself was unable to get arms for his men. It was at this time that Jackson requested the 1,000 pikes for his men. The problems concerning the availability of arms in the Valley were not unique to Ashby.

As was mentioned at the beginning of this chapter, the Confederate shortage of arms was nationwide. Given the nature of the weapons shortage, Ashby's inability to get arms was not a proper reflection of Ashby's understanding of bureaucracy. The arms did not exist. Ashby overcame this shortfall by arming his men with lances and clubs when necessary. The most often

employed solution to Ashby's arms shortfall was to secure them from the enemy. This he did on numerous occasions. In direct contrast to Tanner's assessment, Ashby deserves commendation for his ability to overcome his weapons shortages and still succeed in his mission.[35]

Final Thoughts

During this phase of the campaign, Jackson's cavalry performed admirably. Their efforts directly contributed to the escape of Jackson's army after their defeat at Kernstown. The cavalry achieved success in their security mission despite the incident at Cedar Creek and a critical shortage of arms. By holding the Stony Creek line for more than two weeks, the cavalry provided significant time for Jackson to reorganize and train his army.

Second Phase of the Withdrawal
(16 April – 29 April)

Federal activity in the Valley, and throughout Virginia, created a situation that required Jackson to restart his withdrawal up the Valley. As events in this phase unfolded, it became clear that Jackson's position at Rude's Hill was untenable. By 17 April, Jackson's army was again on the move.

Valley Army Operations

On 16 April, Banks restarted his advance south. Banks' forces were able to surprise one of Ashby's cavalry companies along the northern reaches of the Stony Creek line. Expecting that this uncharacteristic move by Banks signaled an earnest effort to advance, Jackson withdrew the infantry and artillery support he had given to Ashby's rear guard. Jackson also directed Ashby to give up Stony Creek, if pressed.[36]

The Federals advanced in earnest on 17 April. Ashby withdrew across the North Fork at Rude's Hill but failed to burn the bridge there. Although the bridge across the North Fork at Rude's Hill remained unburned, the Federals did not immediately cross the river. Ashby's

defensive position on Rude's Hill, with its artillery, deterred a Federal advance until late afternoon when Federal long-range artillery forced the 7th Virginia to withdraw.

Even before Ashby's withdrawal from the Stony Creek line, Jackson prepared to withdraw his army from the vicinity of Rude's Hill. The withdrawal from Rude's Hill began in earnest on the morning of the 17 April. By the end of the seventeenth, the majority of Jackson's army was camped on the Valley Pike between New Market and Harrisonburg.[37]

Even before Banks' aggressive advance on the Stony Creek line, Jackson began synchronizing the movement of his and Ewell armies. When forced to withdraw from his position at Rude's Hill, Jackson directed Ewell's force toward Swift Run Gap. Jackson's army arrived at Conrad's store on the 19th, Ewell on the 30th. [38]

Despite Jackson's withdrawal to the south, Banks' main body continued its cautious advance. Banks' main body did not enter New Market until 20 April. Jackson remained camped at Conrad's store through the end of April. By the end of the month, Banks' main force was positioned along the Valley Pike between New Market and Harrisonburg. Ashby's cavalry remained positioned between Jackson's main force at Conrad's Store and Banks' advance guard at Harrisonburg.[39]

Once arriving in Harrisonburg, Banks was in no hurry to advance south into Staunton. Jackson reasoned that Banks would not advance any further south than Harrisonburg while the Valley Army was in a position to threaten Banks' army from the flank and rear. In actuality, Banks was unaware of Jackson's position near Conrad's Store. Banks confidently reported to Washington on the twentieth that Jackson had left the Valley for good. After gaining Harrisonburg, Banks elected to wait for Frémont's forces to arrive from western Virginia before making an advance into Staunton. As it would turn out, Frémont never arrived.[40] (See Figure 6.)

Cavalry Operations

On 16 April, Ashby's cavalry screen along the Stony Creek line suffered a major defeat. A Federal force of infantry and cavalry surprised Company H of the 7th Virginia because the Confederates had failed to post sentinels. The Federal force surprised and captured sixty Confederate cavalrymen. This event occurred along the northeast portion of the Stony Creek line.[41]

Because of this event and other indicators of increasing Federal activity, Jackson prepared to reinitiate his withdrawal up the Valley. The infantry and artillery forces added to Ashby's line withdrew, and Ashby again began a rear guard operation.[42]

Before withdrawing from Stony Creek, Ashby prepared the bridge across the North Fork for burning. Ashby made these preparations in anticipation of a strong Union advance. Using massed formations of infantry battalions and cavalry, the Federals forced Ashby to withdraw. Although the bridge was set on fire, the Federal cavalry pursued with enough vigor to reach the bridge in time to put out the fire. The bridge did not suffer significant damage, and the Confederate artillery positioned on Rude's Hill drove back the Federal force that was pursuing Ashby and his cavalry force across the North Fork.[43]

In order to force Ashby to withdraw, Federal long-range artillery was positioned southwest of Rude's Hill along the west side of the North Fork. From this position, the Federals began shelling Ashby's position. Due to the range, the Confederate artillery was unable to respond. In addition, the Federal forces were sent south along the west bank of the North Fork in order to flank Ashby's position. By late afternoon, Ashby had to withdraw from Rude's Hill.

Ashby's rear guard and screening mission continued through the end of the month. Through a combination of Ashby's harassment and Banks' caution, the Federal advance guard did not enter Harrisonburg in force until 22 April. As the withdrawal ended, Ashby set up a screen from positions north of Staunton in the west, to McGaheysville in the center, and to Luray

in the east. Several skirmishes occurred along this line including an attempted Federal

penetration at McGaheysville on 24 April. Ashby's cavalry prevented any penetration of this

screen.[44]

In addition to the security missions, the cavalry also conducted several miscellaneous

missions during this phase. On 19 April, several companies of Ashby's cavalry conducted a raid

east of Massanutten Mountain. Jackson directed Hotchkiss to take two companies of Ashby's

cavalry and to burn three bridges across the South Fork. The mission was poorly executed,

however, and Hotchkiss reported that men of Company D, one of the cavalry companies taken on

the mission, suffered the after effects of a night of drinking. Consequently, Federal forces

(which were guarding two of the three bridges) drove Company D from the field. In the end, the

Confederates were only able to destroy the southern-most of the three targeted bridges.[45]

At the end of April, Jackson's cavalry was still conducting its screen of the main force at

Conrad's Store. This screen ran from Luray in the north to Staunton in the south. In addition,

the cavalry continued to harass Banks' force near Harrisonburg.

Assessment of Cavalry Operations

Security continued as the primary cavalry mission during this phase. In addition, the

cavalry performed several other missions as well. Each is considered here. Because the cavalry

organization continued to change during this phase, a few comments on this topic is also

necessary.

Security Missions

The security mission included a combination of a screening and outposts mission and a

rear guard mission. Security operations switched several times between these two primary types.

The cavalry reinitiated its rear guard operations on 17 April. In this capacity, the cavalry was

able to secure Jackson's army as it continued its move south. After about a week, the rear guard

operation devolved into a stationary screen and outpost mission.

The results of the actions of the 7th Virginia during this period were mixed. In particular, the surprise of Company D along the Stony Creek line was a clear failure. However, the cavalry repulsed every attempt by the Federals to penetrate the Confederate screen. The actions of the cavalry along the Stony Creek line, the repulse of the Federals at Rude's Hill, and the thwarted Federal penetration at McGaheysville are the most notable examples where the Confederates thwarted Federal penetrations. The action of Company D was a major failure but did not result in a screen penetration. As such, it does not negate the overall security provided by the cavalry to Jackson's main body.

Toward the end of the month, the screen was so successful that the Federals were certain Jackson was no longer interested in the Valley. Brigadier General James Shields, commander of Banks' advance guard, confidently reported on 20 April that "Jackson is flying from this department" and there is "no need for troops in the Valley but those necessary to garrison different posts."[46] As late as 28 April, Banks declared, "the enemy is in no condition for offensive operations" and that "a small force will hold all that is important to the government here [the Valley]."[47] Jackson's enemy was unaware of what Jackson could do. Certainly, the effectiveness of the cavalry screen contributed, in part, to the Federals' misunderstanding of the true nature of the situation.

Miscellaneous Missions

The primary miscellaneous missions in this phase were bridge burning missions--the bridge over the North Fork at Rude's Hill and the others under the direction of Hotchkiss. Each of these missions was fraught with problems.

Several historians have harshly criticized Ashby's cavalry during this phase of the campaign. In particular, several conclusions of Robert Tanner are especially negative. As part of the cavalry assessment, several of Tanner's conclusions should be addressed.

Tanner strongly criticized the actions of the cavalry on 17 April. In particular, Tanner alleges that Jackson withdrew from Rude's Hill because of the inability of Ashby to burn the bridge across North Fork. Tanner blames the cavalry for Jackson's withdrawal from Rude's Hill.

> A vital crossing had been lost, and within hours a long-range Federal battery was pounding Rude's. . . . Even the advantage of high ground would not compensate for this, and Jackson decided that the time had come to head for the Blue Ridge.[48]

Several facts refute Tanner's conclusion. Most notably, Jackson set into motion his plans to withdraw from Rude's Hill before the events on the seventeenth. Prior to the Federal assault on the Stony Creek line, General Johnston ordered Jackson to withdraw to Conrad's Store if and when Banks' advanced in earnest. Thus, Jackson had already anticipated his withdrawal from Rude's Hill and had already directed General Ewell towards Conrad's Store. Jackson withdrew his infantry force, which was supporting Ashby in his security mission, from Ashby's Stony Creek line on 16 April. Before the retreat of Ashby across the North Fork, Jackson was moving his main body towards Conrad's Store.

Tanner's statement leads one to believe that the bridge was necessary for the placement of the Federal artillery in question. In fact, the long-rang Federal battery Tanner talks about did not cross the bridge and remained on the western side of the North Fork. In addition, the river was not as high as it had been a couple of weeks before and was fordable in several places. Hotchkiss indicates Rude's Hill was abandoned because of the Federal long-rang artillery and Federal forces flanking down the western side of the North Fork south of Rude's Hill.

Although the Federals were able to cross the North Fork on the bridge in question, Ashby's force on Rude's Hill drove them back across the river. Ashby continued to command the bridge across the North Fork until Federal artillery began their shelling of Rude's Hill. The failure of Ashby to complete the burning of the bridge had no effect on the decision to abandon Rude's Hill.

However, Ashby's inability to burn the bridge did have negative consequences. The subsequent--after Ashby's withdrawal--movement of Banks' wagon trains was easier with the bridge in place. However, Jackson's selection of Conrad's Store as a defensive position occurred apart from the events concerning the bridge. The unburned bridge, albeit unfortunate, was not the cause of Jackson's move south.

The Confederates abandoned Rude's Hill for three primary reasons. First, Jackson was ordered to withdraw towards Conrad's Store when Banks made an aggressive move south. Second, Federal long-range artillery placed on the western side of the North Fork was more capable than Confederate artillery. Third, the North Fork was fordable in several places and Federal forces were moving south along the western side of the North Fork in an effort to flank the Confederate position at Rude's Hill. The defensive position at Rude's Hill was untenable, and Jackson recognized this well before Ashby's men failed to burn the bridge there.[49]

Hotchkiss' bridge-burning mission is more worrisome. On this occasion, the cavalry failed miserably. This event contributed significantly to Jackson's concern about the discipline of Ashby's cavalry. Out from under Ashby's direct supervision, the company commanders allowed their men to fail in their duty.

Organization Issues

Throughout both withdrawal phases, Ashby's command was growing. By the end of April, Ashby's command had grown from fourteen to twenty-two companies of cavalry, plus Chew's Battery. This more than doubled the number of cavalry to about 1,500 men.[50] As mentioned in chapter 3, at times, as many as one-third to one-half of the cavalrymen might be unavailable because of the difficulty of maintaining their horses.

The most significant organizational problem within the cavalry was the lack of regimental leadership. Besides Turner Ashby, the only regimental officer in the 7th Virginia was Major Funsten. Ashby had not yet received approval for more officers and his command was

critically lacking in officer leadership, particularly at the regimental level. The 7th Virginia was

short more than four officers at the rank of major and above. Numerous lieutenant positions, at

the company level, remained unfilled. (See footnote eleven for more details.) Without

additional officers, Ashby relied on his company grade officers for leadership. As some of the

incidents of this phase of the campaign indicate, not all of his company commanders were up to

the task.

What was done about this problem? Colonel Ashby continued to correspond with the

Secretary of War on the issue of his cavalry's organization, including leadership and logistical

issues. The issues remained unresolved. Albeit an inefficient solution, Jackson recognized this

limitation as well and was compelled to increasingly send his own staff officers to oversee

special cavalry missions.[51]

<u>Final Thoughts</u>

In summary, the cavalry put in a mixed performance during this phase of the campaign.

Although the Confederate cavalry's rear guard action was generally a remarkable success, it was

not perfect. The capture of most of Company H on 16 April and the intoxication of Company D

on 19 April are inexcusable. These two incidents do reflect serious discipline problems among

Ashby's cavalry. Historians, including Tanner, strongly rebuke Ashby for these two incidents.

These events deserve rebuke. However, these incidents do not invalidate, by themselves, the

other solid accomplishments of the 7th Virginia during this phase of the operation.[52]

It is not certain, but likely, that this intoxication incident and Company H's capture led

Jackson to produce his 24 April order. As mentioned in chapter 3, this order placed the cavalry

companies under the command of two of Jackson's infantry brigade commanders, effectively

stripping Ashby of his command. (This issue was already discussed in chapter 3 and will not be

belabored here.) Several questions come to mind concerning the situation underlying Jackson's

decision to alter Ashby's command. The Company H commander was relieved of command for

his failure near Stony Creek. Given that Ashby and his cavalry skirmished with Federal forces forty times in thirty-nine days, what more could Ashby do to improve his unit's discipline?[53] In addition, what opportunity did Ashby have to conduct training? How effective would Ashby's security mission, including both rear guard and screening operations, have been if cavalry troops were positioned in infantry camps receiving discipline and training? Within Ashby's cavalry, there was significant room for improvement. However, given the operational realities, Ashby properly placed emphasis on the conduct of daily operations. Jackson's solution for his cavalry's shortcomings, if implemented, would have greatly reduced the effectiveness of his cavalry.

The strain of constant operations and the lack of discipline, at times, created several severe lapses in cavalry performance. However, despite the failures, Ashby's cavalry remained invaluable to Jackson's operation. The efforts of the cavalry provided security for Jackson's army and provided Jackson sufficient time to reorganize and rebuild his army.

<u>Surprise at McDowell</u>
(30 April – 18 May)

After arriving at Conrad's Store, Jackson spent the last days of April formulating a plan for future operations in the Valley. Since the Battle of Kernstown, Jackson had been looking for an opportunity to take the offensive. Jackson's planning was conducted in close coordination with General E. Lee who was acting as Davis' military advisor. Lee was increasingly involved in directing military movements because Johnston was significantly busy with the defense of Richmond. Through a series of letters that started on 21 April, Jackson and Lee developed the situation from which Jackson developed his plan.[54]

Lee's exact duties remained unclear, but in practice, Lee was able to coordinate and direct the more remote Confederate forces operating in Virginia. Included among these remote forces were those of Brigadier General Charles Field in Fredericksburg, Brigadier General Edward Johnson west of Staunton, Major General Ewell west of the Blue Ridge, and Major

General Jackson in the Valley. Arrayed against the Confederates, including those under the direction on General Johnston, were the four Federal armies of McClellan, McDowell, Banks, and Frémont. (See Figure 6.)

Lee's primary concern was the increasing threat of Federal forces near Fredericksburg. Though Lee left the selection of the course of action up to Jackson, Lee's intent was for Jackson to take an offensive action to reduce the possibility of the Federals opening another front against Richmond along the Fredericksburg line of advance.[55]

> The blow, wherever struck, must, to be successful, must be sudden, and heavy. The troops used must be sufficient and light.[56]

After contemplating several options, Jackson elected to join his army with the command of Brigadier General Edward Johnson in an effort to drive back Frémont's advance guard under command of Brigadier General Robert H. Milroy. After driving Milroy back, Jackson would combine his force with Ewell's force and concentrate on driving Banks' army from the Valley. If successful, a Confederate advance down the Valley would place McDowell's flank at risk, thus preventing McDowell from advancing on Richmond to join McClellan.[57]

For their part, the Federals had plans of their own. Because of the strong pronouncements by Banks and Shields about the safety of the Valley, the Washington leadership was convinced they could now send additional troops east. On 26 April, Lincoln ordered Banks to stop his advance south. Shields was to prepare to join McDowell in the Rappahannock Department. On 1 May, Secretary Stanton directed Banks to retire to Strasburg and then send Shields' division from there to join McDowell.[58]

McDowell's army, reinforced by Shields to about 40,000, would then proceed south and join McClellan's advance on Richmond. Banks, reduced to less than 10,000 after transferring Shields' division, would control the Valley from Strasburg.[59]

Unknown to both sides at the time, the Federal plan actually reduced the risk of Jackson's plan. Jackson set his plan into motion on the morning of 30 April. This occurred two days after Banks declared, "The enemy is in no condition for offensive operations."[60] Banks began initiating his withdrawal towards Strasburg on 1 May. The conditions for the next significant confrontation of the Valley Campaign were set.

Valley Army Operations

On the morning of 30 April, Jackson sent his army south along the eastern bank of the South Fork of the Shenandoah River towards Port Republic. The distance was only sixteen miles, but the condition of the roads was so poor that the trip took two and one-half days. The army then moved south to Mechum River Station through Brown's Gap. From there, Jackson's army boarded trains and traveled west. It camped several miles east of Staunton on 6 May.[61] (See Figure 7.)

Banks lost track of Jackson on 2 May. For the next seven days, there was a lot of confusion among the Union leadership, not only those in the Valley but also those in Washington and across Virginia were confused as to Jackson's intention. At one point, Milroy, Banks, and McDowell were all reporting that Jackson was on their front. Banks began his withdrawal from Harrisonburg on 4 May and concentrated his army at New Market, suspecting an attack via Luray.[62]

Jackson's army, now including the forces of Brigadier General Johnson, began advancing towards Milroy on 6 May. Jackson's force cleared Staunton on 7 May. Jackson's advance guard, under command of Johnson, surprised Milroy. As Frémont's advance guard, Milroy was well out in front of Frémont's other forces. The nearest portion of Frémont's main body was Brigadier General Schenck's division thirty-four miles away. After making contact with Johnson, Milroy began a hurried withdrawal from the vicinity of Staunton. [63]

As Johnson advanced and Milroy withdrew, elements of both sides skirmished on 6 and 7 May. In late morning on 8 May, the two brigades of Johnson's force crested Shenandoah Mountain, about twenty miles west of Strasburg. As he proceeded down the western side of the mountain, Johnson ascended Sitlington's Hill to reconnoiter the disposition of the Federals. Milroy was holding a position on the west side of Bull Pasture River.[64] (See Figure 8.)

Jackson joined Johnson on Sitlington's Hill in the afternoon. From their vantage point, the two generals discussed how they might dislodge Milroy from his position. They discussed different options, but made no decisions. At that time, only Johnson's forces were on the field. Jackson's force had yet to arrive. The Confederates would launch their attack the next day.[65]

Milroy was aware of the growing number of Confederates gathering around Sitlington's Hill and decided to launch a spoiling attack that afternoon. At the time Milroy initiated his attack, Johnson's two infantry, brigades remained the only Confederates on the field.[66]

The Battle of McDowell raged for four hours and finally ended at 2030 hours. Jackson's army repulsed Milroy's attack, the brunt of the attack met by Johnson's two brigades. Jackson sent Brigadier General Taliaferro's Brigade, the 3rd Brigade of the Valley Army, into battle within the first few hours. Campbell's Brigade, the 2nd Brigade of the Valley Army, took its place on the field in the last few hours of the battle. Campbell's Brigade did not engage the enemy.[67]

The Battle of McDowell was Jackson's first tactical victory in the Valley Campaign, but it was not entirely well executed by Jackson. Jackson did not anticipate Milroy's spoiling attack. Because Jackson's entire force was not on the battlefield, the Confederates suffered more losses than their Federal counterparts. Although the Federal force numbered about 6,500, only 1,700 were committed to the attack. The nine Confederate regiments engaged numbered about 4,500. Despite the flaws in the battle's execution, Jackson won the field. Milroy reinitiated his withdrawal.[68]

For the next week, Jackson pursued Milroy as far as Franklin, thirty-four miles to the north. Remaining close on Milroy's heels, Confederate cavalry fought several small skirmishes with Milroy's rear guard between 11 and 13 May. By 15 May, Jackson was back in the Valley.[69]

Due in part to the "fog of war," Banks remained at New Market from 5 to 11 May. During this time, Banks suspected an attack from Jackson via Harrisonburg or an attack from Ewell via Luray, and subsequently, on 12 May, Banks stopped his southern movement and retired from New Market to Strasburg. Concurrently, Shields' division began its movement to McDowell via Luray.[70]

While Jackson was fighting Frémont, Ewell was camped at Conrad's Store, where he had arrived with his army on the afternoon of 30 April. After his arrival, Jackson gave Ewell the basics of his plan and directed him to remain at Conrad's Store to watch Banks. For the next eighteen days, Ewell remained camped at Conrad's Store. With each day, his frustrations grew. During his stay at Conrad's Store, Ewell received conflicting directives from Jackson, Lee, and even Johnston. The confusion over the different orders froze Ewell in place. Ewell and Jackson did not met face to face during this phase.

Cavalry Operations

Jackson began executing his offensive plan on 30 April. As part of this plan, the cavalry conducted a demonstration to distract Banks, still near Harrisonburg. Hopefully, Ashby's efforts would confuse Banks and hide Jackson's true intentions. To assist in this mission, Captain Hotchkiss, under cavalry escort, proceeded to a peak on the Massanutten Mountain and provided, through signals, information to Ashby about Federal reactions. This ploy lasted until sunset on 30 April. A similar demonstration occurred on 1 May. Both were successful.[71]

Jackson's original plan assumed his army would reach Mechum River Station in a day. As it turned out, it took two and one-half days. After the movement of his army stalled, Jackson

sent back for some of Ashby's cavalry. Two companies of Ashby's cavalry, under command of Captain John Q. Winfield, supported Jackson's movement towards Staunton.[72]

While Jackson moved to attack Milroy, the 7th Virginia continued to conduct its screen and outpost mission. The screen stretched from north of Staunton in the west to north of Conrad's Store in the·east. In addition, Ewell's cavalry forces carried the screen further east. Not yet having appointed a single cavalry chief, Jackson split his cavalry command and control between Ashby and Ewell. Ewell's cavalry screen ran from Conrad's Store to Luray and further east into the Potomac District it had just left.

On 2 May, several Federal scouts penetrated the 7th Virginia cavalry screen and observed Jackson's position near Port Republic. Ashby's cavalry captured a few of the scouts, but the remainder returned to Banks with its information.[73]

As Banks began his withdrawal from Harrisonburg on 5 May, Ashby's cavalry pursued him. At this time, Captain Winfield, Company B, commanded the cavalry because both Colonel Ashby and Major Funsten were sick. Ashby was unavailable for duty from about 2 to 5 May. Even without Ashby, the cavalry continued to demonstrate against Banks' rear guard. This activity contributed to the confusion that then developed among the Federals about Jackson's activities to the south.[74]

On 5 May, Jackson sent his temporary cavalry commander, Captain Winfield, back to Ewell to warn him of Banks' departure from Harrisonburg. Jackson was unaware that Ashby was already informing Ewell about the movement of Banks. Jackson also directed Winfield to collect eight additional companies of cavalry for his attack against Milroy.[75]

As Jackson moved towards McDowell, he had only two companies of cavalry, under command of Captain George F. Sheetz. Jackson's additional requested cavalry units were still en route with Captain Winfield at the time of the Battle of McDowell.

At the time of Milroy's preemptive attack, Sheetz' cavalry were busy on several miscellaneous missions. One mission was to conduct a reconnaissance to determine a passable route for Jackson to bring up his artillery. Jackson's plan, as he and Johnson had discussed, was to bring the artillery to bear on Milroy from an indirect, but passable, route because the terrain at Sitlington's Hill was prohibitive. Because of the miscellaneous missions, the Confederate cavalry was not on the field at the time of the battle.

On the morning after the battle, Sheetz conducted a pursuit of the enemy. The cavalry skirmished with Milroy's rear guard and continued to drive it back. The Federals were within nine miles of Franklin by 2200 hours on 9 May. Jackson's infantry was following quickly.[76]

Sheetz' two companies continued to skirmish with Milroy's men over the next few days. Jackson joined Sheetz on the eleventh. On 11 May, the cavalry conducted three separate attacks to clear Trout Rock Pass, a few miles south of Franklin. This opened the way for Jackson's infantry. The rest of his army was still en route. By 13 May, Milroy began receiving reinforcements from Frémont. Satisfied with his results, Jackson redirected his army south.[77]

While Sheetz conducted his fight, Jackson directed, as early as 10 May, the remaining cavalry companies to conduct several miscellaneous missions. They blockaded every route from the Valley towards Franklin to prevent Banks from joining forces with Frémont's army. These missions took place over the next four days.[78]

While Jackson was out of the Valley, Ashby continued to conduct his screening and outpost mission across the Valley. Ashby's command followed Banks' withdrawal from Harrisonburg to New Market on 5 May and remained close behind when Banks withdrew from New Market on 12 May. Although out of contact with Jackson, Ashby continued to demonstrate in front of Banks. It was Ashby's intention to give Banks every impression that Jackson's army was right behind him.[79]

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Assessment of Cavalry Operations

During this phase of the operation, the coordination between Jackson and his cavalry was not very good. This occurred for two primary reasons. First, the 7th Virginia's leadership was sick, and command fell on the shoulders of Captain Winfield. Second, Jackson was out of the Valley for more than a week. Jackson was unsure, at times, what his subordinates were doing in the Valley. The mission given by Jackson to Captain Winfield is a good example of this uncertainty. It was unnecessary for Jackson to send Winfield to Ewell because Ashby's cavalry was already keeping close tabs on Banks and informing Ewell of Banks' movements.

Security Missions

With one notable exception, the cavalry continuously conducted a successful screen across the lower Valley. There was one breech of the screen on 2 May, but even after that, the Federals remained confused as to Jackson's location. In Jackson's absence from the Valley, the cavalry conducted a good screen and outpost mission. By its keeping constant pressure on Banks, the Confederate cavalry kept the Union commander unaware of Jackson's movements to the south. While Ewell had been frozen in place because of the conflicting orders from Jackson, Lee, and Johnston, Ashby had discerned Jackson's intentions. Jackson communicated with Ewell several times, directing him to pursue Banks if he moved. Out of touch with Jackson, Ashby performed the function Jackson was trying to get Ewell to do. Not until after the Battle of McDowell were the Federals clear about Jackson's position. A full reading of the correspondence between the various Federal leaders from 2 to 10 May makes it clear that they were confused about what was occurring. Consequently, the screen was quite effective.[80]

Battlefield Missions

The absence of the cavalry at the Battle of McDowell is disturbing. Jackson made his request for cavalry support too late for most of them to join him on the field. This may have been an oversight on Jackson's part, or more likely, confusion due to the coordination problems

previously discussed. The sickness of both Ashby and Funsten for the several days before the Battle of McDowell likely created some difficulties.

By all accounts, Captain Winfield and Captain Sheetz provided good support to Jackson. However, for reasons unknown, Johnson conducted the advance guard on 6 May without any cavalry. The presence of an advance guard of cavalry might have hampered Milroy's ability to prepare his position at McDowell. The absence of the cavalry at the time of the attack was a result of the special missions they were conducting under Jackson's orders. The spoiling attack by Milroy caught Jackson by surprise.

Sheetz conducted a well-executed pursuit of Milroy. The constant pressure applied forced the Federals to cover more than twenty miles in one day. The cavalry kept pressure on the Federals until the Confederate infantry arrived. The cavalry was able to dislodge the Federals at Trout Rock Pass and open the line of advance on Franklin. As it turned out, the Federals were able to reinforce their position at Franklin before Jackson's main force arrived there in force.

Miscellaneous Missions

The missions to block all of the crossroads through the Alleghenies was also well executed. Although Banks made no effort to reinforce Frémont's department, the cavalry still blockaded the roads. (The effectiveness of these blockades later, in the end of May, caused Frémont significant difficulty in reinforcing Banks when Jackson attacked him in the next phase of the Valley Campaign. Because of these blockades, Frémont had no west-east avenues of approach into the Valley between Moorefield and McDowell.)

Final Thoughts

Despite the challenges facing the Confederates during this phase of the campaign, the cavalry performed well. The several-day long absences of Ashby and Funsten likely contributed, in some degree, to the timing problems associated with the cavalry support to Jackson on his way to McDowell. However, Jackson did not request more than two companies of cavalry support

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until after 5 May. These two companies, and the eight companies that joined Jackson's effort later, performed their missions well.

In the Valley, Ashby's cavalry added to the confusion that was apparent in the Federal leadership. The constant pressure applied by Ashby as the Federals withdrew was extremely important to Jackson's efforts. Not only did it prevent Banks from knowing Jackson's intentions but it also set up the conditions that contributed to Jackson's future successes in the next phase of the campaign.

Conclusion

After a month-long retreat, Jackson was able to retake the offensive. Throughout this phase of the campaign, the cavalry directly contributed to Jackson's success. Several particular events showed the lack of depth of cavalry leadership. The lack of regimental organization and additional field grade officers required more leadership from the company commanders. Clearly, some company commanders were not up to the challenge. Despite leadership, organizational, and logistical problems, the cavalry was able to support and significantly contribute to Jackson's campaign.

This phase of the campaign represented a shift from the defense to the offense. The Valley Army began the phase in retreat and ended on the offensive. By 18 May, Frémont was licking his wounds in Franklin and Banks' army was less than half it former size. Banks concentrated his main body in Strasburg and his screening force near Woodstock. Shields' division was out of the Valley on its way to the Rappahannock Department. Jackson's force was in Harrisonburg. Ewell's force was at Conrad's Store. Across its front, Ashby's cavalry screen ran from McDowell, to Franklin in the west, and to Woodstock in the east. Ewell's cavalry force was east of the Massanutten watching Shields' division transfer to the Rappahannock Department.

[1] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 12, part 3, 383-384. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted).

[2] Because the rivers in the Shenandoah Valley flow from the south towards the Potomac River in the north, the upper Valley is in the south and the lower Valley is in the north.

[3] *OR*, vol. 12, part 1, 234-235.

[4] *OR*, vol. 12, part 3, 43.

[5] *OR*, vol. 12, part 3, 43.

[6] *OR*, vol. 12, part 3, 843.

[7] *OR*, vol. 5, 1097.

[8] Charles L. Dufour, *Nine Men in Gray* (Lincoln, NE: University of Nebraska Press, 1993), 65; and Lenoir Chambers, *Stonewall Jackson: The legend and the Man to Valley V* (New York: William Morrow and Co., 1959), 489.

[9] Wilfred Buck Yearns, *The Confederate Congress* (Atlanta, GA: University of Georgia Press, 1960), 64.

[10] Yearns, 60-65.

[11] According to the *Troopers Manual*, a typical cavalry regiment, not counting any staff positions, included a colonel, a lieutenant colonel, and a major. In addition, each company had one captain and two lieutenants. Ashby's command had grown to over twenty companies, effectively two regiments. Ashby did not receive his promotion to Colonel until the end of March. In his command, Ashby had only one other field grade officer, Major Funsten. Each company had one captain, but not every lieutenant position was filled. Resultantly, Ashby's command was short four field grade, or higher positions, and an unknown number of other officer positions.

[12] *OR*, vol. 127, 1128.

[13] Whenever "7th Virginia" appears in this thesis, this refers to the 7th Virginia Cavalry Regiment, Ashby's command.

[14] *OR*, series IV, vol. 1, 987.

[15] *OR*, vol. 12, part 3, 845; and George M. Neese, *Three Years in the Confederate Horse Artillery* (New York: The Neale Publishing Company, 1911), 13.

[16] *OR*, vol. 11, part 3, 419;

[17] Neese, 38-39; and Jedediah Hotchkiss, *Make Me a Map of the Valley*, 3d ed. (Dallas, TX: Southern Methodist University Press, 1988), 9.

[18] *OR*, vol. 12, part 3, 18; 838-842;

[19] *OR*, vol. 12, part 3, 27; 39.

[20] Hotchkiss, 41.

[21] Dufour, 61.

[22] James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 167-169; and Neese, 38.

[23] Neese, 39.

[24] Neese, 40.

[25] Avirett, 170.

[26] Neese, 32.

[27] Hotchkiss had previously been a member of the Confederate Army, working on a map of Tuggart's Valley for General Lee. Because of poor heath, Hotchkiss left the army. By March 1862, his health had improved and he returned to the army to assist Jackson.

[28] Hotchkiss, 10; 15; 20.

[29] *OR*, vol. 12, part 3, 49.

[30] Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg,Va: H. E. Howard, Inc., 1992), 25. Armstong documents that Ashby had 35 skirmishes in 28 days.

[31] Hotchkiss, 19.

[32] Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 149.

[33] Avirett, 167.

[34] Tanner, 149.

[35] *OR*, vol. 12, part 3, 845; and Yearns, 126.

[36] *OR*, vol. 12, part 1, 426.

[37] *OR*, vol. 12, part 3, 853.

[38] *OR*, vol. 12, part 3, 844;

[39] *OR*, vol. 12, part 1, 445-447.

[40] *OR*, vol. 12, part 3, 446, 476.

[41] *OR*, vol. 12, part 1, 426-427; and Armstrong, 25.

[42] Hotchkiss, 26-27; Avirett, 174; and Neese, 46.

[43] Hotchkiss, 25; Avirett, 171-172; and Neese, 42-48.

[44] *OR*, vol. 12, part 1, 448; and Hotchkiss, 32.

[45] *OR*, vol. 12, part 3, 445; and Hotchkiss, 27;

[46] *OR*, vol. 12, part 3, 94.

[47] *OR*, vol. 12, part 3, 112.

[48] Tanner, 157.

[49] *OR*, vol. 12, part 3, 845; Neese, 46-48; and Hotchkiss, 25.

[50] Chambers, 489. Exact figures for the size of the cavalry at this time do not exist. Other sources place the number closer to 2,000. The 1,500 figure reported by Chambers seems more likely and is corroborated, somewhat, by the 7th Cavalry Regimental history by Armstrong. The range, from these sources, is between 1,000 and 2,000.

[51] Avirettt, 169; Chambers, 489; and Hotchkiss, 26.

[52] Hotchkiss, 31; and Tanner, 156, 159.

[53] The number of skirmishes for this period comes form a careful analysis of the diaries of Neese and Hotchkiss and the account of Avirett.

[54] *OR*, vol. 12, part 3, 859-860; and Chambers, 493-495.

[55] *OR*, vol. 12, part 3, 866.

[56] *OR*, vol. 12, part 3, 865-866.

[57] *OR*, vol. 12, part 3, 470. This summary is based on numerous letters written between the primary Confederate military leaders (*OR*, vol. 12, part 3, 859-870).

[58] *OR*, vol. 12, part 3, 107, 122.

[59] *OR*, vol. 12, part 3, 122; and William Allan, *Stonewall Jackson, Robert E. Lee, and the Army of Northern Virginia* (New York: Da Capo Press, 1995), 69.

[60] *OR*, vol. 12, part 3, 112.

[61] *OR*, vol. 12, part 3, 469-470; Henry Kyd Douglas, *I Rode with Stonewall* (Chapel Hill, NC: University of North Carolina Press, 1940), 47-48; and Allan, 69-71.

[62] *OR*, vol. 12, part 3, 126,129, 132, 135.

[63] *OR*, vol. 12, part 3, 126, 470; 465; Douglas, 49; Allan, 71; and Chambers, 503.

[64] Allan, 73.

[65] *OR*, vol. 12, part 3, 473.

[66] *OR*, vol. 12, part 3, 465-466; 472; Allan, 76-77; and Chambers, 504.

[67] *OR*, vol. 12, part 3, 472.

[68] *OR*, vol. 12, part 3, 466; 472;

[69] *OR*, vol. 12, part 3, 473; 491.

[70] *OR*, vol. 12, part 3, 180.

[71] Hotchkiss, 34.

[72] Avirett, 180.

[73] *OR*, vol. 12, part 3, 126.

[74] Dufour, 67; and Avirett, 180.

[75] *OR*, vol. 12, part 3, 881, and Avirett, 179.

[76] *OR*, vol. 12, part 3, 157.

[77] Armstrong, 24; and Chambers, 508.

[78] Hotchkiss, 43-45.

[79] Dufour, 67.

[80] *OR*, vol. 12, part 3, 126-160.

CHAPTER 6

SURPRISE

> I will not retreat. We have more to fear from the opinions of our friends than the bayonets of our enemies.[1]
>
> Major General Nathaniel P. Banks, *Civil War Quotations*

Major General Banks expressed these remarks to his staff on 23 May 1862. Throughout the night, despite information of Jackson's victory at Front Royal, Banks maintained his resolve. By 0900 hours on 24 May, however, Banks had changed his mind and his army was in a full retreat towards Winchester.

Introduction

After conducting a successful offensive operation against Major General John Frémont west of the Shenandoah Valley, the Confederates, under the command of Major General Thomas Jackson, returned to the Valley. Even as Jackson was repositioning his army into the Valley, he was contemplating further offensive operations. Jackson was eager to refocus the efforts of his army against the Federal forces currently occupying the lower Valley.

At the middle of May, the Federal army was holding several positions across a 150-mile wide arc of Virginia. Major General Nathaniel Banks was holding the northern portion of this arc in the Federal Department of the Shenandoah. The Federals were in the process of repositioning Major General James Shields' division from Banks' Department of the Shenandoah, which included the Valley, to McDowell's Department of the Rappahannock. From his position in the northeastern portion of the arc, Major General Irvin McDowell intended to open a second front against Richmond with a force of 40,000, including Shields' 12,000 man strong division.[2] (See Figure 9.)

For their part, Confederate leaders were aware of their enemy's intent to open a second front against Richmond. Through maneuver, the Confederates desired to threaten the Federals in such a way as to prevent this eventuality. The only forces free for maneuver were those forces operating in the Valley, primarily those of Major Generals Richard Ewell and Thomas Jackson.

Banks' army was the logical portion of the Federal front to attack. Geographically, Banks' portion of the Federal front in Virginia provided an avenue of approach to the backdoor of Washington. Because of its proximity to Washington, any attack here would cause apprehension about the security of the Union capital. In addition, Banks' army, significantly reduced in size after the departure of Shields' division, was slightly less than half the size of the combined forces of Jackson and Ewell. On 16 May, General Robert E. Lee outlined his intent to Jackson.

> A successful blow at [Banks] would delay, if it does not prevent, his moving . . .
> Whatever move you make against Banks do it speedily and if successful, drive him back
> toward the Potomac, and create the impression, as far as practicable that you design
> threatening that line.[3]

In response to a serious threat toward the Potomac via the Valley, the Confederates expected that the Federals would reposition their forces. By so doing, an action against Banks could diminish the Federal threat against Richmond.

For the remainder of the Valley Campaign, Jackson commanded both his army and Ewell's force. Consequently, reference to Jackson's army for the remainder of this campaign analysis includes Ewell. In addition, Ewell's cavalry are included in the analysis of cavalry operations, because they were also available for Jackson's efforts in the Valley. Throughout this phase of the campaign, Jackson did not consolidate his cavalry under one leader. Ashby continued to command the 7th Virginia Cavalry Regiment. Ewell maintained control of his cavalry. These cavalry forces included the 2nd and 6th Virginia Cavalry Regiments.

This chapter will focus on the period from 16 May 1862 to 25 May 1862. The content and format for this chapter will follow the model of the previous chapter. The first chronological portion of this chapter will include the week of maneuvering before and the Battle of Front Royal--16 May to 23 May. The second section will include the meeting engagement of Jackson and Banks during Banks' retreat from Strasburg and other events on 24 May. The final part of this chapter will focus on the Battle of Winchester and other events on 25 May.

Drive toward Winchester and the Battle of Front Royal
(16 May -- 23 May)

As indicated in General Lee's guidance of 16 May, Jackson was to focus his army's offensive effort against Banks. To achieve this end, Jackson and Ewell would have to coordinate their efforts. Initially, Jackson provided guidance to Ewell that called for his army to unite with Ewell's forces near Harrisonburg. From Harrisonburg, Jackson's intention was to advance against Banks' fortified position at Strasburg.[4]

Jackson and Ewell met on 18 May near Mount Solon, about fifteen miles southwest of Harrisonburg, to determine their course of action. In this meeting, Ewell provided Jackson with confirmation that Shields had departed the Valley. Additionally, Ewell showed Jackson a letter written by Johnston on 13 May.

> I [Johnston] have written to Major-General Jackson to return to the Valley near you, and if your united force is strong enough to attack Banks. Should the latter [Banks] cross the Blue Ridge to join General McDowell at Fredericksburg, General Jackson and yourself should move eastward.[5]

Johnston's directive provided confirmation for Jackson's plan. In response, Jackson and Ewell solidified their plans to take the offensive against Banks.[6]

Valley Army Operations

At the beginning of this phase of the operation, Jackson was marching his army back into the Valley. His army was camped on the eastern edges of the Alleghenies on 16 May. That day

was declared a national day of fasting and prayer throughout the Confederacy. Honoring this proclamation, Jackson did not continue his march into the Valley until the next day.[7]

On the morning of 18 May, the main body of Jackson's army was camped near Mount Solon with the forces of Brigadier General Edward Johnson. Unknown to Banks, Jackson's army had returned to the Valley. At the time, the Federals believed that the only active Confederate forces in the Valley were those of Ashby's cavalry. Ewell's force remained camped at Conrad's Store.[8]

On 18 May, the main bodies of the Federal armies of Frémont and Banks remained stationary at Franklin and Strasburg respectively. One division was in the process of moving east. (As discussed in the previous chapter, Major General James Shields' division departed the Valley via Luray and then Front Royal on 12 May.[9]) As the primary unit shifting to the east, Shields' division was, by 18 May, on its way from Warrenton to Fredericksburg. (See Figure 9.)

The initial plan of Jackson and Ewell was to attack Banks at Strasburg. In addition to Ewell's force, Jackson directed General L. O'Bryan Branch's force to join the effort against Banks. As early as 17 May, Jackson ordered Ewell and Branch to move toward Strasburg via Harrisonburg. Jackson's original intention was that Ewell would be north of New Market by the twenty-first. As mentioned, in their meeting on 18 May, Jackson and Ewell worked out further details of this plan.[10]

In anticipation of the attack at Strasburg, Ashby's cavalry moved forward to the Stony Creek line. The Stony Creek line ran east to west across the Valley south of Woodstock and north of Mount Jackson. The plan, after the arrival of the forces of Jackson and Ewell, was for Ashby to conduct the advance guard for Jackson's move north. While waiting for consolidation of the armies of Jackson and Ewell, Ashby maintained a strong defensive position along Stony Creek and continued to monitor Banks.[11]

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On 20 May, the main bodies of Jackson and Ewell were concentrated between New Market and Luray. On the previous day, Jackson's main body moved up from Mount Salon and Ewell's Louisianians, under Brigadier General Richard Taylor, marched into the Valley from Conrad's Store. The remainder of Ewell's army proceeded toward New Market via Luray. The movement of most of Ewell's army via Luray allowed Ewell to remain closer to Branch, thus preventing a large break in the Confederate line to the east.[12] (See Figure 9.)

During the day of 20 May, several important communications altered the course of the Valley Campaign. Ewell received orders from General Joe Johnston to move his force east in response to Shields' move toward Fredericksburg. This message also indicated that Johnston was ordering Branch back to the east. This new guidance conflicted with Lee's intent of the sixteenth. (At this point in the campaign, the Confederate command and control was convoluted. Technically, Johnston had control over all Confederate soldiers in Virginia, including those in the Valley. Realistically, Johnston was too busy to manage all of the forces because his focus was on the threat to Richmond. Resultantly, General Lee began to provide guidance to Confederate forces operating at the further reaches of Virginia, including those in the Valley. Obviously, this command and control situation created confusion for commanders in the field.)[13]

In response to Johnston's message, Jackson immediately telegraphed General Lee for guidance concerning his operations against Banks. In this telegraph, Jackson expressed both his desire to attack Banks and the countermanding order of Johnston. Lee forwarded Jackson's message to Johnston.

Based on the information provided by Ewell on the twentieth, Jackson delayed his movement from New Market, for the moment, while Ewell's forces began marching back out of the Valley toward Luray. Considering Johnston's guidance to Ewell, Jackson surmised that Johnston wanted any major engagement with the Federals to occur east of the Valley. By noon,

Jackson moved his army east to follow Ewell and his plan of attack against Banks at Strasburg was dead.[14]

By early afternoon on 21 May, Jackson received a reply from Johnston.

If you and Ewell united can beat Banks do it. I cannot judge at this distance. My previous instructions warned you against attacking fortifications. If it is not feasible to attack [Banks] let Genrl. Ewell march towards Hanover C.H. reporting from time to time on his way. Only general instructions can be given at this distance.[15]

Jackson's movement east and Johnston's guidance necessitated the development of a new plan of attack.

Jackson and Ewell met on the evening of 21 May near Jackson's new headquarters at Luray in order to develop this plan. In this meeting, Jackson and Ewell developed a plan of attack against the Federal garrison at Front Royal. As part of Banks' command, Colonel John R. Kenly commanded the garrison. In total, Kenly's command numbered slightly more than 1,000 men. Kenly was entirely unaware of the Confederate movements to his south or their plans to attack his position.[16]

Early in the afternoon on 23 May, Jackson's force pushed back Kenly's pickets who were about two miles south of Front Royal. Ewell's Maryland Line, under command of Brigadier General George "Maryland" Steuart, conducted a frontal advance against Kenly's defensive position one mile north of Front Royal. Ewell's cavalry, the 2nd and 6th Virginia,[17] were returning from a sweep to the east of Front Royal. Mounting 500 sabers, the 2nd and 6th Virginia were approaching the Shenandoah River from along the Manassas Gap Railroad. Seeing that his flank was turned, Kenly retired across the North Fork and South Fork before Ewell's cavalry cut off his axis of retreat. (See Figure 10.)

Although the Federals attempted to burn the bridge across the North Fork, the advancing Confederate cavalry cornered Kenly's command near Cedarville, a few miles north of Front Royal. A devastating charge of four companies of the 6th Virginia destroyed any remaining

organized resistance by Kenly's force. The Federal losses at Front Royal numbered more than 900--killed, wounded, or captured.[18]

Cavalry Operations

The 2nd and 6th Virginia were each five companies strong. For this reason, the two generally operated together as one regiment in the Valley Campaign. Their combined ten companies equaled to the normal complement of companies in a regiment. Initially, Colonel Thomas Munford, a member of the 2nd Virginia, commanded these forces. On 18 May, Lieutenant Colonel Thomas Flournoy assumed command of the 2nd and 6th Virginia while Colonel Munford was in Richmond attempting to obtain arms for his men.[19]

From 16 May to 20 May, Jackson's cavalry conducted a security mission across a wide area. The cavalry conducted this mission in two different operations. Ashby led one of these missions with a portion of his regiment, five companies. Captain John Q. Winfield, Company B, conducted the second of these missions with a detachment of ten companies from the 7th Virginia Cavalry. (Winfield's detachment was the one that had supported Jackson's previous action against Frémont.)

On 16 May, as Jackson was moving his army back into the Valley, Ashby continued to conduct his security mission in the Valley. Ashby located his headquarters for this screening and outpost mission in Mount Jackson. His command closely monitored Banks' position near Strasburg. Banks' own screening forces were between Strasburg and Woodstock. The Confederate cavalry screen and outpost mission ran from the Alleghenies to the Massanutten. This operation continued through 21 May.[20]

Captain Winfield conducted his portion of the cavalry security mission, in the form of a screen and outpost operation, between McDowell and Franklin. Whereas Ashby's focus was Banks, Winfield focused his operation against Frémont. In reality, these were two independent cavalry operations.[21]

Most of Winfield's ten companies remained in the west throughout this phase of the campaign. The size of this force was necessitated by the condition of the horses, not the challenge of the operation. Most of the horses in Winfield's detachment were in terrible condition. The pursuit of Frémont, conducted in the previous portion of the campaign, had taken its toll. The horses needed time to rest and recuperate. Most of the cavalry companies not actively conducting the screen and outpost operation against Frémont remained near McDowell for more than a week.[22]

From 15 to 17 May, independent of Ashby, Lieutenant Colonel Thomas Munford of the 2nd Virginia conducted an information mission east of the Massanutten. Munford's mission was to monitor the progress of Shields' division as it moved east. After following Shields for nearly a week from 12 to 18 May, Munford reported to both Ewell and Lee of Shields' progress and Shields' intention to link-up with McDowell. During this mission, on 15 May, Colonel Munford attacked Shields' wagon train at Linden, a small town ten miles east of Front Royal. The Confederate cavalry achieved surprise in this attack. Munford's men were able to capture several men, wagons, and horses.[23]

Ashby's security mission south of Banks increased its activity on 18 May. Ashby established a stronger position along the Stony Creek line and began shifting his focus from a defensive to an offensive posture. This change in posture occurred in anticipation of Jackson's upcoming operation against Banks. Even before meeting with Ewell at Mount Solon, Jackson's orders indicated his intention to advance upon Banks from the direction of New Market. Ashby's move to the Stony Creek line supported Jackson's intent. During the move, Colonel Ashby and his men skirmished with Colonel DeForest, of the 5th New York Cavalry Regiment, in and around Woodstock on 18 May.[24]

In addition to their security mission, Ashby's men conducted information missions during this period as well. One of these missions was a scouting mission with Captain Jedediah

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Hotchkiss. Hotchkiss was under special instructions from Jackson to reconnoiter Banks'

defenses around Strasburg and to refine Confederate maps of this area. Ashby's scouting

mission with Hotchkiss lasted for several days beginning on 19 May.[25]

After he abandoned his direct attack against Banks at Strasburg, Jackson altered the

nature of Ashby's security mission. In addition to providing security, Jackson directed Ashby to

demonstrate on Banks' front. The purpose of this demonstration was to conceal the movement of

Jackson's main body to the east of the Massanutten.[26]

On 22 April, Ashby further split his command. Jackson required Ashby to bring some of

his men east of the Massanutten to assist him in his operation against Front Royal. Ashby took

five companies with him on this operation. Four companies of Ashby's 7th Virginia were left to

demonstrate against Banks along the Stony Creek line.[27]

Captain Samuel B. Myers, Company C, took command of the four companies of the 7th

Virginia that Ashby left behind. This detachment continued its demonstration in front of Banks

after Ashby departed. The demonstration continued until 24 May.[28] (See Figure 11.)

While conducting his mission, Captain Myers' command had additional responsibilities.

Jackson had directed the cavalry to destroy communications up and down the Valley. The

destruction of these communications would additionally hamper the ability of Banks to collect

information about Jackson's movements.[29]

During the Battle of Front Royal, Jackson tasked his cavalry with several miscellaneous

missions. Before Jackson's return to the Valley, Ewell had sent cavalry to scout the Federal

position at Front Royal. Jackson and Ewell knew that only a small Federal garrison defended the

town and that the geography made the town difficult to defend. On 23 May, as a result of this

information, Jackson sent Ashby on an operation northwest of Front Royal and Lieutenant

Colonel Flournoy, now commander of the 2nd and 6th Virginia, on an operation east of Front

Royal.[30]

On the morning of 23 May, while Jackson and Ewell attacked Front Royal, Ashby conducted an independent raid against Buckton Station. The purpose of Ashby's raid was twofold. First, Ashby was to destroy a portion of the Manassas Gap Railroad and the telegraph line between Strasburg and Front Royal. Second, the 7th Virginia was to prevent Banks from moving to the aid of Kenly. In all, Ashby used one squadron of cavalry in this raid, five companies totaling about 300 men.[31] (See Figure 10.)

In addition, on the morning of 23 May, Flournoy conducted a raid on the railroad and telegraph lines east of Front Royal. Like Ashby's raid at Buckton Station, Flournoy's raid had two purposes. First, the raid prevented communication from or with Front Royal to the east. Second, the destruction of the rail lines prevented rapid movement of reinforcements into the area.[32]

Ashby succeeded in destroying the rail and telegraph lines at Buckton Station. However, two charges were required to drive two companies of Federal infantry from within a depot located at Buckton Station. The Federals eventually abandoned the depot, but subsequently established a strong defensive position behind a railroad embankment. Ashby unsuccessfully conducted two additional charges against the Federals. Having achieved Jackson's intent, Ashby withdrew from the Federals and established a blocking position between Buckton Station and Front Royal.[33]

After returning from its raid east of Front Royal, Flournoy's cavalry moved towards Kenly's rear and the bridges across the Shenandoah. The presence of Flournoy's cavalry prompted Kenly to abandon his defensive position north of Front Royal, even before he clashed with Jackson's infantry. Kenly crossed the bridges across the North and South Fork Rivers a few minutes before Flournoy arrived, setting fire to the bridge across the North Fork.[34]

Seeing Kenly's retreat, Jackson rode ahead of his infantry and met Flournoy. Jackson directed Flournoy to pursue Kenly across the burning North Fork Bridge. Eventually, the

Confederates succeeded in putting out the fire and securing the bridge. Additionally, the first four companies of Flournoy's cavalry pursued Kenly. The two squadrons of cavalry, under Flournoy's direction, charged Kenly's force as it made a stand near Cedarville. After several charges, Kenly was defeated and the cavalry killed, wounded, or captured more than 900 men--more than 90 percent of Kenly's command.[35]

After the Battle of Front Royal, Jackson consolidated his infantry and his cavalry continued to provide security for his force. The 7th Virginia conducted a screen on both flanks of Jackson's army. In the west, the cavalry screen included Ashby's force east of Buckton Station, Myers' force south of Strasburg, and the cavalry force around McDowell--including other regions south of Franklin. Jackson also tasked the 7th Virginia to provide security east of Front Royal--including Ashby's Gap fifteen miles to the northeast. (See Figure 1) For his part, Flournoy provided security along the road from Cedarville to Winchester. During the late afternoon, Flournoy scouted to a position five miles from Winchester. With the main body of his army at Front Royal, Jackson's cavalry security extended across a 120 mile front.[36]

<center>Assessment of Cavalry Operations</center>

The primary mission of the cavalry during this phase of the campaign continued to be security. The cavalry provided security primarily through outpost and screening missions. During this phase, the cavalry also performed several miscellaneous missions in support of Jackson's campaign. Finally, the cavalry performed battlefield missions, both shock action and pursuit.

<u>Security Missions</u>

The cavalry excelled in its security mission. Consistent with its performance of this mission in the previous phases, the cavalry continued to prevent the Federals from ascertaining Jackson's movements in the Valley. Jackson twice surprised Banks. First, Banks was slow to learn that Jackson had returned from McDowell or that Ewell was on the move. Second, Jackson

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caught both Banks and Kenly unaware at Front Royal. Despite the length of the front for the outpost and screening mission, the cavalry consistently kept the Federals at bay while gathering critical information about Federal movements for their own commander.

Operating out of McDowell, Winfield's detachment of ten companies was able to secure the western portion of the Valley. This security covered the mountain passes between the Alleghenies and the Valley. Although many of these companies were inactive throughout this phase, the security mission was still effective.

Some historians, particularly Douglas Southall Freeman, have criticized Ashby for leaving such a large portion of his cavalry in the west where it was unavailable for operations in the lower Valley. Captain James Avirett, a member of Ashby's staff, provides an explanation for the size of 7th Virginia's detachment in the west. According to Avirett, the horses were in poor condition and needed time to recuperate. No matter how much Ashby, or Jackson, may have wanted them to fight, they simply were unfit to do so.[37]

Federal sources corroborate the difficulty of maintaining horses in the region where Winfield's cavalry had been operating. According to the Union Quartermaster-General's Office, Frémont was finding the area of his operations particularly difficult on his horses. On 19 May, Frémont made an additional request for horses although he had yet to receive his original allocation of horses. There was no supply of horses in the region. While operating between Franklin and McDowell, Brigadier General Milroy reported that in "his advanced position he found all forage exhausted."[38] The Federals also reported that the rugged mountains of the region and the lack of proper sustenance worked in combination to the detriment of their horses.

Reports in the *Official Records of the Union and Confederate Armies* provide evidence from a variety of reports, both Confederate and Federal, of the harshness of region west of the Alleghenies, from McDowell to Moorefield. Avirett's explanation for the reason so many of Ashby's cavalry companies remained near McDowell seems valid. Ashby employed the ten

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companies he left in the west as well as possible, and this decision was prudent for, if not mandated by, the conditions at the time.

The security mission south of Strasburg was particularly effective. The cavalry played a premier role in the surprise achieved by Jackson at Front Royal. Because of the success of the cavalry's security mission, Banks was continually unaware of Jackson's activities in the Valley. The day that Jackson met with Ewell at Mount Solon, on 18 May, Banks reported to Washington that Jackson's infantry had not returned to the Valley. On that day, Ashby effectively repulsed an attempted Federal screen penetration. Banks did not learn until 21 May that any Confederate infantry was back in the Valley, and it was on this day that Ashby's demonstrations were shielding Jackson's departure from the Valley to the east.

Even after Jackson attacked Front Royal, Banks remained convinced that Jackson's main body was south of Strasburg. This perception was due to the aggressive deception by Captain Myers. On the evening of 23 May, Captain Myers' men occupied several hills near Strasburg and began entrenching them as infantry would, moving from hill to hill to disguise their few numbers. Banks remained certain that Jackson was south of his own army's position at Strasburg.

Information Missions

The cavalry successfully conducted several information missions during this phase. Of particular note was the scouting mission completed by Colonel Munford as he monitored the movement of Shields' division from 12 to 18 May. The information provided by Munford was particularly important.

Colonel Munford's information was valuable to not only the Valley Commander but also the Confederate high command. Munford ascertained the purpose of Shields' transfer and McDowell's intention for the use of those forces. The offensive operations of Jackson and Ewell

were in direct response to this information. The victorious attack by Munford at Linden is added testimony to the measure of effectiveness of this mission.

Miscellaneous Missions

The cavalry conducted numerous miscellaneous missions during this phase as well. The most important of these occurred in support of the Battle of Front Royal. Before Jackson's infantry advanced in the afternoon, the small Virginia hamlet was already isolated from both support and communication. The actions of the cavalry ensured Banks did not receive immediate notification of the events on his left flank.

The cavalry raids of Ashby and Flournoy were vital to the success of the Battle of Front Royal. The actions of the cavalry ensured the element of surprise for the Confederates. Ashby's men also captured several Federal locomotives and their freight cars.[39]

Battlefield Missions

The cavalry played a significant role on the battlefield during the Battle of Front Royal. Although the infantry assisted in encouraging Colonel Kenly to abandon his position at Front Royal, the cavalry was solely responsible for routing the Federals at Cedarville. Seeing the charge of Flournoy at Cedarville, Jackson told his staff, "Never had I seen such a gallant charge."[40] The cavalrymen had shed all the Confederate blood at Front Royal and the victory was theirs.

Ashby was able to accomplish his mission at Buckton Station, but was not as successful as Flournoy was at Cedarville. Before meeting the Federal infantry, Ashby's men cut the rail and telegraph lines. This part of his mission complete, Ashby would have been better served if he had not attacked the Federals at Buckton Station.

Instead of withdrawing, Ashby attacked a small group of Federals that had barricaded themselves in a train depot. In this strong defensive position, the Federals poured deadly fire into the charging Confederates. Two charges failed to drive the Federals from the depot. A

dismounted company was finally used to drive out the Federals. The Federals moved to a strong defensive position behind a railroad embankment. Ashby directed two more unsuccessful charges against this position. Ashby lamented the absence of Chew's Battery in this engagement and suffered fifteen casualties in the skirmish. Among the casualties were two of his best company commanders-- Captain Sheetz and Captain Fletcher.[41]

James Avirett observed the fight at Buckton Station and believed Ashby was wrong to charge the Federals in their defensive position. Avirett was right. Ashby had already achieved Jackson's intent even without charging the small Federal force at the depot. Given the defensive position of the Federals, the attack should have initially occurred dismounted, if at all. Ashby's command suffered the majority of its fifteen casualties in these charges and failed to achieve the desired result. The loss of two capable company officers, in a command deficient in strong leadership, was a very high price to pay.

Meeting Engagement on the Valley Pike
(24 May)

In the early evening of 23 May, Banks received the first reports concerning the events at Front Royal. Banks was slow to act on the information. At midnight, Banks received an accurate assessment of the situation from Captain Saville, of the 1st Maryland Infantry Regiment (Union), who had fought at Front Royal. Banks still doubted that Jackson, and not someone else, was on his left flank. Despite Saville's information and against the advice of his staff, Banks remained adamant about holding Strasburg. Banks' force in Strasburg, including infantry and cavalry, amounted to about 6,000 men.[42]

By the morning, Banks still intended to hold Strasburg. Banks was convinced that only Ewell had attacked at Front Royal. All information to the contrary, Banks believed Jackson's force remained near New Market. As late as 0715 hours, Banks communicated to Washington his resolve to hold Strasburg. Not until Colonel Charles Tompkins, of the 1st Vermont Cavalry

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Regiment, returned from a scouting trip to Woodstock, did Banks realize the danger facing his army. Tompkins could not find any of Jackson's army except for elements of the 7th Virginia. With tremendous haste, Banks put his army into motion toward Winchester at 0900 hours.[43]

Valley Army Operations

The exact movements of Confederate and Federal forces on 24 May are difficult to reconstruct, due to the confusion caused by the meeting engagement that occurred along the Valley Pike. The first meeting of the two armies occurred between 1000 and 1100 hours when the 2nd and 6th Virginia charged into Banks' wagon train near Newtown. Jackson quickly responded to the news from Newtown by sending a large force to intercept Banks near Middletown. Because the meeting engagement occurred as Banks' army marched along the Valley Pike, Banks' army soon fled in all directions, abandoning many of its supply wagons on the road.[44]

The Federal retreat from Strasburg turned into a rout. Only small elements of Banks' army attempted to stand their ground. At the time Jackson intercepted Banks' wagon train, almost all of the Federal infantry was near Winchester. On the Union side, the majority of the skirmishes during the day involved Federal cavalry. Initially, the abandoned wagons and captured soldiers of Banks' army provided more resistance to Jackson's advance than organized Federals.

During the day, some infantry moved from Winchester to Newtown. These infantry units joined some of the Federal cavalry which was attempting to slow the Confederate advance toward Winchester. The two armies continued skirmishing throughout the day, and it was long after sunset before the armies stopped.

What remained of Banks' army was concentrated in Winchester. Jackson's main body was near Kernstown, a few miles south of Winchester on the Valley Pike. Ewell's army was less

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than two miles from Winchester on the Plank Road--a direct road between Front Royal and Winchester.[45] (See Figure 12.)

Cavalry Operations

The cavalry played a pivotal role in the meeting engagement. Because the cavalry was involved across a wide front, reconstruction of the activities of the cavalry on this day is easier to understand by separately considering the activities of each cavalry element.[46]

The cavalry force in the Alleghenies, ten companies strong, continued to monitor Frémont. They continued this security mission south and east of Franklin. This cavalry detachment was particularly interested in monitoring the relatively few passes across the Alleghenies. Frémont did not attempt to move east through these passes. The passes remained blocked, because of the activity of the 7th Virginia a few weeks earlier.[47]

Captain Myers also continued his demonstration south of Strasburg. After Banks abandoned Strasburg in the morning, Myers split his command. He remained in Strasburg with a small contingent, securing the stores left by Banks. In addition, Myers' contingent continued its security mission, focusing on any Federal movement from the west. The majority of Myers' command, under Captain MacDonald, went in pursuit of the retreating Federals.[48]

Although the primary activity of Jackson's army occurred west of the Shenandoah River, Jackson's cavalry was active to the east as well. Cavalry forces were active east of Front Royal and east of Ashby's Gap. A cavalry force of 200 defeated a Federal company of cavalry, of the 1st Maryland Cavalry Regiment (Union), at Linden--ten miles east of Front Royal. Brigadier General John W. Geary, whose command included the 1st Maryland, reported this event to the Washington leadership. According to Geary, a large Confederate force of 7,000 to 10,000 was moving from Front Royal to Ashby's Gap. Additionally, included in this report was an estimate of a Confederate cavalry force of 10,000. Geary also reported that his spies indicated that the Confederates planned to march east from Ashby's Gap to occupy the forts near Leesburg. Of

course, Geary's report grossly overestimated the Confederate's numbers and improperly described the situation. The only Confederates in the area were Ashby's cavalry--one company near Ashby's Gap and three companies in Front Royal.[49]

The cavalry companies in Front Royal were conducting a flank guard security mission along the eastern edge of the Valley. These cavalrymen also provided information to Jackson on Federal activity east of Front Royal, warning of any Federal reinforcements to the Valley. Some cavalry also protected the equipment and prisoners captured in the Battle of Front Royal. Finally, the Front Royal cavalry continued to destroy rail and telegraph lines east of Front Royal. (Appendix A provides information on the distribution of the cavalry. The companies in Front Royal most likely moved east of the Massanutten on 23 May.)[50]

On the morning of 24 May, the remainder of Ashby's cavalry was conducting an extensive screen south of Jackson's army from Strasburg in the west to Ashby's Gap in the east. One company of Ashby's cavalry was conducting its part of the security mission near Ashby's Gap--located fifteen miles northeast of Front Royal. An additional company was conducting its part of the security mission just east of Strasburg. In support, the remaining four companies of Ashby's command were holding the line from Strasburg to Front Royal. Ashby's mission, in this instance, was to prevent Banks from moving east to Front Royal while Jackson advanced his main body toward Winchester.[51]

Brigadier General George Steuart was now the new commander of the 2nd and 6th Virginia. At the end of the Battle of Front Royal, Jackson placed the 2nd and 6th Virginia under the command of Brigadier General George Steuart because of his prewar experience in the U.S. Cavalry. Prior to this point, Maryland Steuart was commanding a brigade of infantry. The selection of Steuart seems to have been made because Colonel Munford was on a trip to Richmond and unavailable to lead his command. Although Lieutenant Flournoy had performed admirably the day before, Jackson decided regimental command required a more experienced

leader. Jackson selected Maryland Steuart. Ashby remained in command of the 7th Virginia, and Jackson continued with two separate cavalry chains of command.

Moving toward Winchester in the morning, the 2nd and 6th Virginia conducted an advance guard mission. Maryland Steuart met Banks' army retreating toward Winchester along the Valley Pike at Newtown. Maryland and his cavalrymen charged into the Federal wagon train, stopping its progress toward Winchester and causing considerable confusion. After several charges, the 2nd and 6th Virginia disengaged and took up a defensive position east of Newtown.[52]

After discovering the Federals on the Valley Pike, Jackson immediately sent some of Ashby's cavalry to intercept the Federal retreat at Middletown. For this operation, Ashby's command included four companies of the 7th Virginia, Captain Chew's and Captain Poague's Batteries, and Taylor's Louisiana Brigade. Ashby's cavalry and artillery began their attack against the Federals near Middletown at about 1200 hours. Taylor's men arrived around 1400 hours.[53]

Although Steuart's attack at Newtown created confusion along the Valley Pike, Ashby's attack created chaos. Within a few moments, Federals were fleeing in all directions. Banks' army abandoned many of its wagons and supplies. Ashby continued his pursuit, splitting his force. Major Funsten, with Poague's Battery, proceeded north along the east side of the Valley Pike with about ninety cavalrymen. Ashby, with Chew's Battery, engaged the Federals near Middletown with about an equal number.[54]

Shortly after Ashby attacked Banks' wagon train, Jackson rode up. Jackson described the situation as he saw it at this moment in his after action report:

> I accompanied the movement of the main body of the army to Middletown. Upon arriving there we found the Valley turnpike crowded with the retreating Federal cavalry, upon which the batteries of Poague and Chew, with Taylor's infantry, promptly opened, and in a few moments the turnpike, which had just before teemed with life, presented a most appalling spectacle of carnage and destruction. The road was literally obstructed

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with the mingled and confused mass of struggling and dying horses and riders. The Federal column was pierced, but what proportion of its strength had passed north toward Winchester I had then no means of knowing. Among the surviving cavalry, the wildest confusion ensued, and they scattered in disorder in various directions, leaving, however, some 200 prisoners, with their equipments, in our hands. A train of wagons was seen disappearing in the distance toward Winchester, and Ashby, with his cavalry, some artillery, and a supporting infantry force from Taylor's Brigade, was sent in pursuit.[55]

Despite the situation, the Federals, particularly their cavalry, engaged the Confederates throughout the day--the Federal cavalry losses that day were over 20 percent of their 1,500-man force. Colonel Broadhead, 1st Michigan Cavalry Regiment, suffered heavy casualties attempting to attack Steuart's defensive position. Broadhead lost 25 percent of his 200-man force. General John Hatch, commander of Banks' cavalry, directed Lieutenant Colonel Doughty, 1st Maine Cavalry Regiment, to attempt to penetrate Ashby's position near Middletown with four squadrons--five companies of the 1st Maine and three companies of the 1st Vermont Cavalry Regiment. The Confederates forced Doughty back with heavy losses. After Ashby repulsed the charge of the 1st Maine, the 7th Virginia chased Doughty back to Strasburg. Hatch was unable to penetrate the Confederate force at Middletown. After Doughty's failure, Hatch took the remainder of his command, 750 strong, on a longer route to Winchester. The seven companies of the 1st Vermont reached Winchester at 2330 hours. Colonel Othnal DeForest, commander of the 5th New York, split away from Hatch and was unable to reunite with Banks' army. Every time DeForest attempted to move east with his six companies, he was met by the Confederates. DeForest did not reunite with Banks until after 26 May. At around 2200 hours, Major William Collins, 1st Vermont, collided with Ashby's force now near Newtown. Collins' force of three companies, one from 1st Vermont and two from 1st Maine, suffered nearly 70 percent casualties--156 out of 225. From 23 to 25 May, Hatch lost 325 men out of his command of 1,500, almost all of these occurred on 24 May.[56]

As it turned out, the majority of Banks' infantry had already passed Middletown before the Confederates penetrated the retreating wagon train at Middletown. After driving off the

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remaining Federals, primarily Hatch's cavalry, Jackson directed Ashby to proceed north in

pursuit of Banks' main body. Ashby's command--including cavalry, infantry, and artillery--

proceeded toward Newtown. As Jackson was loath to admit, Ashby's pursuit stalled near

Newtown as many in Ashby's force began pillaging the wagons left behind by Banks. Jackson

official report noted disdainfully:

> Many of Ashby's command, both cavalry and infantry, forgetful of their high trust as the
> advance of a pursuing army, deserted their colors, and abandoned themselves to pillage
> to such an extent as to make it necessary for that gallant officer to discontinue farther
> pursuit.[57]

Jackson eventually caught up with Banks' infantry north of Newtown and pursued it until nearly

midnight.[58]

Assessment of Cavalry Operations

The cavalry performed several different missions on 24 May. Security missions

continued across the Valley. The 7th Virginia also continued its demonstrations south of

Strasburg. However, the primary event of the day was the meeting engagement along the Valley

Pike that included both shock action and pursuit.

Security Mission

The cavalry continued to conduct their security mission on the twenty-forth. In the west,

the 7th Virginia detachment prepared to follow Frémont who was preparing to leave Franklin. In

the east, elements of the 7th Virginia provided security from Ashby's Gap in the northeast to

Front Royal. In the morning, Ashby also led a security mission between Strasburg and Front

Royal.

The flank guard security mission conducted by Ashby's cavalry along the eastern edge of

the Valley on the morning of 24 May was particularly effective. The activity of these companies

of cavalry contributed to the exaggerated reports by Union Brigadier General Geary. Geary's

reports added significant confusion to Federal interpretations of events in the Valley.[59]

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Ashby and Steuart's security mission near Front Royal prevented Banks from penetrating with his own cavalry. Steuart's security mission was an advance guard conducted along Plank Road. Ashby directly led a portion of his cavalry, four companies, in a screening and outpost mission through the night and early morning of the twenty-forth. Ashby's screen ran from south of Strasburg in the west, along the northern edge of the Massanutten, towards Front Royal in the east. Despite several efforts, Banks reported that he was unable to penetrate Jackson's cavalry screen from either the direction of Strasburg or Winchester.[60]

Information Missions

On the morning of 24 May, the cavalry company accompanying Jackson's cartographer, Hotchkiss, closely monitored Federal activity near Strasburg. Reports from this company went to Jackson on a half-hourly basis. This information played an important role in Jackson's decision-making process that morning.[61]

Miscellaneous Missions

Myers continued his demonstration south of Strasburg. The element of deception employed by Myers in his demonstrations continued to fool Banks. Banks remained convinced that Jackson's army was to the south. Banks did not learn the truth until 0900 hours. Within an hour, the Confederates attacked his unprepared army on the Valley Pike. The effectiveness of Myers' activities played an extremely important role in the surprise Jackson achieved at both Newtown and Middletown.[62]

Battlefield Missions

Several aspects of the cavalry operations on 24 May raise questions about cavalry employment. The first issue involves the conduct of Steuart's cavalry at Newtown. The second issue involves the conduct of Ashby's cavalry at Middletown.

Brigadier General Steuart's command was the first Confederate force to engage the Federals on the morning of the 24 May. Jackson's orders to Steuart were to observe the enemy.

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Maryland was to use his own discretion in advancing. Although he did succeed in capturing numerous supplies and prisoners, Steuart did not press his advantage. He carried out Jackson's orders; however, he failed to exploit an obvious advantage. He led several charges against the enemy around Newtown. However, Steuart did not pursue and, instead, took up the defense. Failing to pursue the enemy aggressively, Maryland allowed a large portion of Banks' army to reach Winchester. With a force of nearly 500, it is nearly certain that Steuart's cavalry could have achieved better results. A few months later Jackson clearly articulated his view of the role of cavalry. The cavalry was "to follow as long as the enemy retreats."[63] Maryland did not do this. Given the situation along the Pike that day, he should have exploited both his overwhelming advantage and his cavalry's full capability.[64]

Review of the *Official Records* provides a possible explanation for Maryland's hesitancy. Jackson's main body did not reach Middletown until 1500 hours. Because of the situation, Jackson initially recalled some of Ewell's men toward Middletown and directed Ewell to halt his advance. Jackson later countermanded this order. Ewell did not receive specific orders to advance toward Winchester until 1745 hours. The confusion of these orders may have affected Steuart's movement northward. However, this confusion does not fully explain why Maryland was not already in pursuit before 1500. This explanation is by no means an excuse. The failure of Steuart to exploit the situation represents a failure of the cavalry.[65]

A Careful analysis of the events of 24 May raises two particular issues regarding the activities of the 7th Virginia. First, why was Ashby's command in the field so small that day? Second, what degree of pillaging occurred among Ashby's men, and how did that affect Ashby's pursuit of Banks?

Why was Ashby's command in the field so small that day? This question is difficult to answer because incomplete records exist for the 7th Virginia. Additionally, Ashby's command was scattered over a wide area. Appendix A provides an educated assessment of the actual size

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and distribution of Ashby's command on this day. From Appendix A, Ashby's command on 24 May was no more than 180, half or more riding with Funsten.

Jackson reported the pillaging incident in his after action report. Immediately after the Battle of Winchester, Jackson published General Order Number 52 and 54, both of which addressed pillaging. The problem was a real one.

The record shows that all branches of the service were involved in the pillaging. Corporal George Neese, Chew's Battery, acknowledges in his diary that he "took his turn in the wagons."[66] General Richard Taylor writes in his book, *Destruction and Reconstruction*, that his Tigers were "looting right merrily, diving in and out of wagons with the activity of rabbits in a warren."[67] When reading Jackson's report, it is important to remember that Ashby was sent north of Middletown in command of a combined arms force. Reference in the report to pillaging by Ashby's command includes all three branches, not just cavalry. Some historians believe the small number of Ashby's cavalry on the field at Newtown is an indicator that many went home with their booty. Captain Chew refutes the assessment that the cavalry was pillaging. "We [Ashby and Chew] had passed the point where the alleged pillaging occurred, and the cavalry were not there, and unless they returned after we passed, the infantry and not the cavalry got the benefit of the spoils."[68] Some of Ashby's cavalry may have taken part in the pillaging. However, a better understanding of the distribution and size of Ashby's cavalry force and an understanding of the situation on 24 May more accurately explains where Ashby's cavalry was.[69]

Ashby's cavalry were not concentrated on the Valley Pike, and, unlike the other branches, the cavalry's pursuit extended well beyond the activities along the road. The situation described by Taylor in his book closely resembles the description in Jackson's reports. In Ashby's command along the Valley Pike that day was a Confederate force of over 1,500 infantry and less than 200 hundred cavalry. There simply were not many cavalrymen along the road because they were scattered in pursuit of the fleeing Federals.

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On 24 May, more than 1,600 Federal cavalrymen were available to provide protection to Banks' wagon train. The Confederates engaged almost all of them on 24 May. More than 1,000 of the Federal cavalrymen were operating near Strasburg and Middletown. Although Jackson's infantry and artillery engaged the Federal cavalry along the Valley Pike, pursuit of them afterward was the cavalry's responsibility. Ashby's men conducted several charges against the enemy along the road, but more cavalry action occurred at reaches far from the turnpike.

Major Funsten took his command north of Middletown in pursuit of a portion of Banks' cavalry. Funsten routed the Federals and they scattered. Funsten pursued them and drove them to the west, not allowing them to proceed toward Winchester. Captain Chew's recollections of the battle confirm this. "The cavalry we defeated retreated towards Winchester, scattered, in fact routed. . . . Our cavalry, of course, pursued, and, of necessity in pursuing a scattered foe, became dispersed themselves."[70]

The *Official Records* includes reports form Federal cavalry leaders after the meeting engagement that confirm Chew's assessment. The cavalry forced the Federals well west of the turnpike and confounded their attempts to reach Winchester. Colonel DeForest, 5th New York, was never able to link up with the Federal main body. Other Federal cavalry, which did link up with the main body, did not reach Winchester until after 2300 hours. A direct trip of fifteen miles took the Federal cavalry more than twelve hours and required them to go a substantially further distance. These official records are a good testament to the vigorous nature of the 7th Virginia's pursuit.[71]

Some historians, including Douglas Southall Freeman, blame Ashby for failing to consolidate his force on the eve of 23 May. In actuality, Jackson dictated to Ashby the distribution of the 7th Virginia for operational reasons. Any blame, if any is warranted, falls on Jackson's shoulders. Although some of Ashby's men may have taken part in the pillaging along Valley Pike, most were busy scattering Banks' command.[72]

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Brigadier General Hatch indicated the consequences for the Federals' execution of the Battle of Winchester because of the activities of the twenty-forth: "T   mmand was with difficulty assembled on the morning of the 25th. . . . they were finally brought into order, but too late to participate in the action at Winchester."[73] Ashby's cavalry significantly contributed to this reality. The condition of Hatch's command is a good measure of the effectiveness of the pursuit conducted by the 7th Virginia on 24 May.[74]

<div align="center">

Battle of Winchester
(25 May)

</div>

Despite the long day of fighting the day before, Jackson began the Battle of Winchester early on 25 May, beginning shortly after 0530 hours. In less than three hours, it was finished, and Banks was in full retreat to Maryland.

In the afternoon, after news of Banks' defeat reached Washington, President Lincoln began setting a trap for Jackson. Lincoln ordered Frémont, with an army of nearly 15,000 men, from Franklin to the Valley. In addition, Lincoln ordered McDowell to send 20,000 men to the Valley. Lincoln planned to move these additional armies behind Jackson and cut him off--ending any Confederate threat from the Valley.[75]

<div align="center">

Valley Army Operations

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As the Battle of Winchester began, Stonewall was not exactly certain of Ewell's location. As it turned out, Ewell was in a strong position on Jackson's right, one-half mile south of Winchester on the Plank Road. Banks' army was holding a line of hills south of Winchester. Jackson's artillery began its barrage of the Federal's at 0530. Ten minutes later, Ewell's batteries came to life on the Confederate right. As the battle progressed, Ewell pressured the Union left, and Jackson maneuvered to the Union right. The numerical advantage of the Confederate force and the application of that force on the Federal flanks quickly achieved the desired result. Shortly after 0800, Jackson recognized the imminent Federal collapse. He turned

to his staffers and declared, "Order forward the whole line. The battle's won."[76] (See Figure 12.)

Although Jackson's infantry pursued the retreating Federal force into Winchester, the Confederate cavalry was nowhere in sight. Jackson lamented the absence of his cavalry at this critical moment, "Never have I seen an opportunity when it was in the power of cavalry to reap a richer harvest of the fruits of victory."[77] Maryland Steuart and his cavalry reached Jackson several hours after the Confederate infantry and artillery had stormed into town.

Once committed, the cavalry chased Banks towards the Potomac River. Steuart and Ashby's cavalry joined north of Winchester around noon. The majority of Banks' army was between Martinsburg and Williamsport at 1800 on 25 May. Banks continued his retreat into Maryland through the night. What remained of Banks' army was across the Potomac by 0900 hours on 26 May. Banks' army was now only two-thirds the size it had been on the eve of the Battle of Front Royal. Steuart and Ashby's cavalry spent the night south of Martinsburg.[78]

Cavalry Operations

On 25 May, the cavalry was busy on several fronts. Ashby's cavalry continued to conduct its security missions south of Franklin, east of Front Royal, and north to Ashby's Gap. Part of Ashby's cavalry was also watching the approaches into the Valley from Moorefield to Strasburg. However, the most significant event of 25 May was the Battle of Winchester. The cavalry committed to this event were Maryland Steuart's cavalrymen, nearly 500 strong, and several companies of Ashby's command operating near Winchester, which included slightly less than 200 cavalrymen.

On the morning of the Battle of Winchester, the cavalry of Ashby and Steuart protected the flanks of Jackson's army. Maryland held a position on the Confederate right. With those cavalrymen he had with him at Winchester, Colonel Ashby held a position on the Confederate left.[79]

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Ashby's command was the first Confederate force to enter Winchester. Ashby pushed through Winchester before the Federal defensive line south of Winchester was broken. Meeting some resistance in town, Ashby overcame and pursued an enemy cavalry force. The pursuit continued to the small hamlet of Yellow House, eight miles east of Winchester. At Yellow House, the Federal force of 400 cavalry attempted to make a stand. Ashby's cavalry defeated them. Shortly after this, Ashby joined Steuart's pursuit.[80]

Although Jackson's guidance to Ashby before the battle is unclear, it is clear that Ashby was, towards the end of the battle, not where Jackson expected him. Ashby was conducting operations near Yellow House towards the end of the Battle of Winchester and those activities kept Ashby busy enough that he was not nearer to Winchester as the Federal defense collapsed. Jackson's expectations were that Ashby would be at another place than where he was when Jackson wanted to send in the cavalry.[81]

Not seeing his cavalry, Jackson dispatched Major Alexander S. Pendleton, a member of his staff, to find the cavalry under command of Maryland Steuart. Pendleton found Steuart at about 1000 hours in a field two and one half miles southeast of Winchester. The conversation between Pendleton and Steuart is a curious one. Pendleton remembered the conversation this way:

> I overtook General Steuart, and directed him, by General Jackson's order, to move as rapidly as possible to join him on the Martinsburg turnpike and carry on the pursuit of the enemy with vigor. He replied that he was under command of General Ewell and the order must come through him. I answered that the order from General Jackson for him to go to join him (General Jackson) was peremptory and immediate, and that I would go forward and inform General Ewell that the cavalry was sent off. I left him, and went on some 2 miles and communicated with General Ewell, who seemed surprised that General Steuart had not gone immediately upon receipt of the order.
> Returning about a mile, I found that, instead of taking the cavalry, General Steuart had ridden slowly after me toward General Ewell. I told him I had seen General Ewell and brought the order from him for the cavalry to go to General Jackson. This satisfied him. He rode back to his command, had them mounted and formed, and moved off.[82]

By the time Maryland began his pursuit, Banks' army was well on its way to Martinsburg. Ashby and Maryland met along the Valley Pike near Bunker Hill, about ten miles north of Winchester. Their combined cavalry succeeded in capturing men and supplies, sending them back to Winchester throughout the day. Steuart and Ashby pursued until after sunset. However, the delay of the pursuit allowed Banks' main body to escape. Although most of Banks' remaining army moved toward Martinsburg, much of it scattered in numerous different directions. Banks' army would cross the Potomac across a sixty-mile front, from Hancock in the west to Harpers Ferry in the east. The Confederate cavalry pursued in all directions. After sunset, most of the cavalry consolidated near Darkesville, fifteen miles north of Winchester.[83]

While Ashby was directly involved in the pursuit of Banks, the remainder of his command continued its operations. The security missions continued along both the eastern and western edges of the Valley. Captain Edward MacDonald also continued his pursuit of Federal cavalry from the meeting engagement on the twenty-forth.

Along the eastern edge of the Valley, the cavalry continued to patrol east of the Shenandoah River. This security mission continued to confuse Brigadier General Geary as to Jackson's true intentions in northern Virginia, and Geary continued to make ominous reports about Confederate activities east of the Blue Ridge.[84]

In the southwest, Captain Harry W. Gilmor conducted his security mission as Major General Frémont was making preparations to leave Franklin. Frémont was responding to Lincoln's order to march after Jackson. Gilmor discouraged Frémont from taking the southern route into the Valley.

In the northwest, elements of Banks' cavalry, driven from the vicinity of Strasburg the day before, were unable to rejoin Banks' command at Winchester. According to his reports, Colonel Othnal DeForest, commander of the 5th New York Cavalry Regiment, was unable to lead his six companies of cavalry to Winchester. DeForest got to within a few miles on the

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morning of the battle. Every time he attempted to move east, a large Confederate force repulsed him. The Confederate force opposing DeForest was most likely that of Captain MacDonald.[85]

Assessment of Cavalry Operations

The cavalry continued conducting a variety of missions. At the operational level of war, the security and information missions conducted by the cavalry played a preeminent role in the successful progression of the campaign. In particular, the cavalry prevented Frémont from entering the Valley via Harrisonburg as Lincoln had directed. Additionally, Geary's reports led Secretary of War Stanton to send many of McDowell's men to the Valley via Washington, significantly delaying their arrival in the Valley. However, the most significant event on this day was the Battle of Winchester.

<u>Battlefield Missions</u>

The cavalry failed Jackson at the Battle of Winchester. The two-hour delay of an aggressive cavalry pursuit allowed Banks to reorganize his routed army near Martinsburg. Although Banks' losses were more than 30 percent, a timely cavalry pursuit would likely have increased the losses substantially. Jackson said as much in his after action report.

> There is good reason for believing that, had the cavalry played its part in this pursuit as well as the four companies had done under Colonel Flournoy two days before in the pursuit from Front Royal, but a small portion of Banks' army would have made its escape to the Potomac.[86]

In order to achieve a fuller analysis of this failure, the actions of Ashby and Steuart are considered separately because each was operating independently on the battlefield.

Ashby and Jackson coordinated the 7th Virginia's activities in person before the battle. The absence of Ashby at the critical moment led Jackson, after the battle, to ask Ashby about his operations on the morning of 25 May. In his report, Jackson noted that "he [Ashby] stated that he had moved to the enemy's left, for the purpose of cutting off a portion of his force."[87] In his report, Jackson made no further comment in relation to Ashby's activities on the twenty-fifth.

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Jackson's exact direction to Ashby before the battle is uncertain, but the likely guidance was for Ashby to swing behind the Federal left and block any Federal retreat to the east. Ashby took up a position on the road from Winchester to Berryville, more than three miles east of Winchester. Several participants, including James Avirett and Jedediah Hotchkiss, support this belief. Several historians, including William Allen and Robert Tanner also support this view of Ashby's activities on 25 May. If Jackson's guidance to Ashby was to block this particular escape route, it is consistent with Johnston's 21 May order to Jackson to prevent Banks from moving his army out of the Valley to the east. For these reasons, it seems reasonable to assert that Jackson's initial guidance to Ashby was to move east of Winchester and block any attempt by Banks to retreat in that direction.[88]

This guidance notwithstanding, Jackson expected Ashby to be closer to Winchester at the conclusion of the battle. Unlike Steuart, Ashby's men were active during the time of the battle. According to Union records, Ashby's cavalry was the first Confederate force to enter the town. The 7th Virginia engaged a 400-man Federal cavalry force in town and then pursued it out of Winchester. As Jackson indicated in his report, he sent Pendleton after Maryland Steuart. The request for Steuart is circumstantial evidence that Jackson was aware of what Ashby was doing, if not entirely sure where he was doing it.

Although Ashby's 200-man force could have effected some damage on Banks' army, the potential effect of Steuart's 500-man force was even greater. Maryland's delay, for a small point of military protocol, is inexcusable. Although he served eight years in the cavalry before the war, Steuart proved himself unassertive as a large cavalry force commander. In combination, the nearly 700 Confederate cavalrymen of Ashby and Maryland could have inflicted substantially more damage against Banks' army than they did because the pursuit of Banks was delayed.

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Conclusion

During this phase of the campaign, the contribution of the cavalry to Jackson's campaign was good. However, opportunities were available, which if exploited, could have made the cavalry's contribution superb. Looking at the campaign at both the tactical and operational levels, the effects of the cavalry were substantially different.

At the operational level, the cavalry, particularly the 7th Virginia, proved more than capable. As the arm of his army most capable of influencing the campaign at this level of war, the cavalry did so in a dynamic way. Lincoln originally ordered Frémont to advance into the Valley via Harrisonburg. This avenue of approach was denied by the cavalry security mission near McDowell. In combination with the blocking of the Allegheny Mountain passes by the 7th Virginia in the previous phase, Frémont had only one direction in which to move, northward. The raids and screens provided by the 7th Virginia east and northeast of Front Royal were also significant. These activities, in combination with Union overreaction, created operational success because large numbers of McDowell's command were shifted to the Valley via Washington, delaying the arrival of these forces to the Valley. The success of the cavalry at this level of war cannot be overemphasized. These successes provided the linkage of Jackson's efforts in the Valley with the overall strategy of the Confederate leadership in Richmond--saving of the Confederate capital.

At the tactical level, the cavalry results were less positive. The deception and screen south of Strasburg played a critical role in the ability of Jackson to achieve surprise. This effort is a cavalry highpoint. This surprise was the critical element in Jackson's success in the three days of battle that highlighted this phase. Additionally, the cavalry provided the tactical victory at Front Royal. In the meeting engagement on 24 May, the cavalry performance was considerably less effective. Whereas the 7th Virginia performed well given its limited numbers, the opportunity presented to the cavalry at Newtown was squandered. Even more dramatically,

the cavalry failed to provide the finishing stroke to Jackson's three days of battle at Winchester. The opportunity in this battle was uniquely suited for the cavalry, and the cavalry failed to capitalize.

Some of the failure at the tactical level was the responsibility of Jackson. The choice of Steuart for the leadership of Ewell's cavalry was a mistake. Jackson had available two more qualified cavalry leaders. Colonel Flournoy proved, at Front Royal, more than capable to lead a cavalry regiment in battle. Ashby had also proved his worth in combat leadership. It is likely that the placement of an organized and sizeable cavalry force under an assertive cavalry leader like as Ashby or even Flournoy for the Battle of Winchester likely would have produced different results on the battlefield. Imagine the outcome, if Jackson had directed Flournoy to take the smaller force of cavalry to block the road to Berryville while holding Ashby in reserve until the critical time. The failure of the organizing, planning, and coordinating cavalry activities for the Battle of Winchester is, at least in part, Jackson's responsibility.

The cavalry achieved some tactical success, but the unrealized potential successes overshadow them. In hindsight, the total destruction of Banks' army seems to have been near at hand. However, in the end, even these potential tactical victories may have been less important than the actual operational victory. An accurate assessment of cavalry operations during this phase of the campaign requires careful consideration of both the operational and tactical levels of war.

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[1] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 12, part 1, 383-384. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted).

[2]*OR*, vol. 12, Part 3, 214.

[3] *OR*, vol. 12, part 3, 892-893.

[4] Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 449-460. The details for this overview primarily follow the logical study of Robert Tanner. The details of this study are included in Appendix A of *Stonewall in the Valley*. Most historians, including Tanner in his first history of the Valley Campaign, conclude that Jackson's plan of attack against Banks was based on first attacking Front Royal. Although the Front Royal attack occurred before the attack on Banks' main force, the initial plan was for Jackson and Ewell to attack Banks at Strasburg. The rational for this assessment is well documented by Tanner. For this reason, the actual conduct of this phase of the campaign adopted in this thesis follows Tanner's chain of events.

[5] *OR*, vol. 12, part 1, 530.

[6] *OR*, vol. 12, part 1, 530.

[7] Tanner, 208-209.

[8] *OR*, vol. 12, part 3, 523.

[9] *OR*, vol. 12, part 3, 183.

[10] Tanner, 234; *OR*, vol. 12, part 3, 895; and William Allen, *Stonewall Jackson, Robert E. Lee, and the Army of Northern Virginia* (New York: Da Capo Press, 1995), 88.

[11] *OR*, vol. 12, part 3, 701; Jedediah Hotchkiss, *Make Me a Map of the Valley*, 3d ed. (Dallas, TX: Southern Methodist University Press, 1988), 46; and Tanner, 457.

[12] Allen, 91.

[13] *OR*, vol. 12, part 3, 897.

[14] George M. Neese, *Three Years in the Confederate Horse Artillery* (New York: Neale Publishing Company, 1911.), 21

[15] Tanner, 242.

[16] Allen, 91; Allen Tate, *Stonewall Jackson: The Good Soldier* (Nashville, TN: J. S. Sanders and Co., 1991), 141; Douglas Southall Freeman, *Lee's Lieutenants: Manassas to Malvern Hill* (New York: Charles Scribner's Sons, 1942), 381; and *OR*, vol. 12, part 1, 524.

[17] From this point on, any reference to the 2nd or 6th Virginia will refer to the 2nd and 6th Virginia Cavalry Regiments unless otherwise stated.

[18] Henry Kyd Douglas, *I Rode with Stonewall* (Chapel Hill, NC: University of North Carolina Press, 1940), 52; Allen, 96; and *OR*, vol. 12, part 1, 702-703.

[19] Allen, 92; *OR*, vol. 12, part 1, 703; and Freeman, 369.

[20] *OR*, vol. 12, part 3, 183; James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 182; and Charles L. Dufour, *Nine Men in Gray* (Lincoln, NE: University of Nebraska Press, 1993), 67.

[21] Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg,VA: H. E. Howard, Inc., 1992), 30.

[22] Armstrong, 30; and Avirett, 198.

[23] Freeman, 356; and *OR*, vol. 12, part 1, 500-504.

[24] *OR*, vol. 12, part 1, 523.

[25] Hotchkiss, 46-47.

[26] *OR*, vol. 12, part 1, 701.

[27] Avirett, 187.

[28] Avirett, 185-186; Dufour, 67; Douglas, 51; and Hotchkiss, 47.

[29] Hotchkiss, 47; and Freeman, 372.

[30] Tanner, 458.

[31] Avirett, 186; Burke Davis, *They Called Him Stonewall* (Short Hills, NJ: Burford Books, Inc., 1954), 30; and *OR* vol. 12, part 1, 702. Detailed information on the methodology used to determine the 300-man figure is included in appendix A.

[32] *OR*, vol. 12, part 1, 702; Freeman, 369; Avirett, 186; and Davis, 30.

[33] Avirett, 186-188; and Dufour, 67-68.

[34] *OR*, vol. 12, part 1, 701.

[35] *OR*, vol. 12, part 1, 702-703; David Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1995), 109; Allen, 97; and Freeman, 380.

[36] Hotchkiss, 48; and Avirett, 192.

[37] Avirett, 198.

[38] *OR*, vol. 12, part 3, 206.

[39] Freeman, 382.

[40] Tanner, 263.

[41] *OR*, vol. 12, part 1, 702; and Avirett, 187-188.

[42] *OR*, vol. 12, part 1, 525; Allen, 93, 101.

[43] *OR*, vol. 12, part 1, 526-527, 584-586.

[44] *OR*, vol. 12, part 1, 703.

[45] *OR*, vol. 12, Part 1, 704.

[46] Appendix A contains information on the distribution of Jackson's cavalry on this day.

[47] Avirett, 198.

[48] Tanner, 319.

[49] *OR*, vol. 12, part 3, 240; and Avirett, 198.

[50] Avirett, 198.

[51] *OR*, vol. 12, part 1, 703; and Tanner, 267.

[52] *OR*, vol. 12, part 1, 703-704; and Tanner, 267-268, 464-465.

[53] *OR*, vol. 12, part 1, 703-704; Avirett, 192-193; and Tanner, 267-268, 464-465.

[54] Avirett 192-193; Douglas, 53; and Allen, 104.

[55] *OR*, vol. 12, part 1, 707-708.

[56] *OR*, vol. 12, part 1, 576, 579-580,582, 587-593, 553.

[57] *OR*, vol. 12, part 1, 703.

[58] *OR*, vol. 12, part 1, 703-704.

[59] *OR*, vol. 12, part 3, 235-245.

[60] *OR*, vol. 12, part 1, 520-525.

[61] Hotchkiss, 24.

[62] *OR*, vol. 12, part 1, 523-526; Tanner, 264; Allen, 101; and Armstrong, 31.

[63] Brigadier General Thomas Munford, "Reminiscences of Jackson's Valley Campaign," *Southern Historical Society Papers*, vol. 7 (Carmel, IN: Guild Press of Indiana, Inc., 1999), 533. CD ROM.

[64] *OR*, vol. 12, part 1, 703.

[65] *OR*, vol. 12, part 3, 899.

[66] Neese, 59.

[67] Tanner, 271.

[68] Avirett, 271.

[69] Neese, 59; Tanner, 271; and Avirett, 271.

[70] Avirett, 270.

[71] *OR*, vol. 12, part 1, 703-705; *OR*, vol. 12, part 1, 570-587.

[72] Freeman, 477-478.

[73] *OR*, vol. 12, part 1, 574.

[74] *OR*, vol. 12, part 1, 574-575.

[75] *OR*, vol. 12, part 3, 219, 274. (A review of the *OR*'s for the week of 24 to 31 May provides a clear picture of the intent and perception of the Federal leadership.)

[76] *OR*, vol. 12, part 1, 704-705; and Douglas, 59.

[77] *OR*, vol. 12, part 1 707.

[78] *OR*, vol. 12, part 1, 527-529.

[79] Avirett, 200; *OR*, vol. 12, part 1, 730; and Dufour, 70.

[80] Avirett, 200.

[81] *OR*, vol. 12, part 1, 707.

[82] *OR*, vol. 12, part 1, 710.

[83] *OR*, vol. 12, part 1, 530, 707-708; and Avirett, 202-205.

[84] *OR*, vol. 12, part 3, 234, 644.

[85] *OR*, vol. 12, part 1, 583-583.

[86] *OR*, vol. 12, part 1, 707.

[87] *OR*, vol. 12, part 1 706.

[88] Avirett, 200-201; Allen, 115; and Tanner, 288.

CHAPTER 7

JACKSON SPRINGS ONE TRAP AND SETS ANOTHER

Always mystify, mislead, and surprise the enemy.[1]

Major General Thomas J. Jackson, *Civil War Quotations*

Jackson had a penchant for secrecy, and he often applied this maxim in order to achieve

it. Another common translation, "Mystery, mystery is the secret of success."[2] The prominence

of this maxim in Jackson's planning and his uncanny ability to apply it continued to confound his

enemies during this phase of the Valley Campaign.

Introduction

In a matter of only a few days, Banks had seen his army disintegrate. Banks' defiance at

Strasburg on 23 May devolved into retreat on 24 May. After the overwhelming Confederate

success at the Battle of Winchester, the retreat of Banks turned into a rout on 25 May. The

devolution continued on 26 May. By 30 May, Banks' entire army was in shambles, scattered

north of the Potomac across a sixty-mile front.

After the Battle of Winchester, Jackson continued his pursuit of Banks all the way to the

Potomac. For nearly a week, Jackson conducted operations in the lower Valley, including a

credible series of skirmishes at Harpers Ferry that created apprehension among the Union leaders

as to Jackson's true intentions.

On 30 May, in response to movements of Federal forces, Jackson again began

preparations to abandon the lower Valley to Federal occupation. Anticipating the Federal trap,

Jackson escaped his enemy's pincer movement, as performed by two converging enemy armies

aimed at the town of Strasburg.

As the campaign progressed, Jackson set a trap of his own for the two advancing Federal

armies, preventing a linkup among them. (See Figure 14.) Through clever use of terrain, rain-

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swollen rivers, and destruction of essential bridges, Jackson divided the Federal armies arrayed

against him while conducting his withdrawal. As a capstone for his campaign, Jackson defeated

each army in turn on subsequent days in the upper Valley. First, Jackson used Ewell's force to

defeat Major General John Frémont's army at Cross Keys on 8 June. Second, Jackson massed

his army, including Ewell's forces, against Major General James Shields' army on the next day.

Jackson's trap, set near the small town of Port Republic allowed Jackson to overwhelm and

defeat two separate Federal armies by commanding the only bridge across the South Fork River

in the Valley. In the end, each of Jackson's defeated foe retired to the lower third of the Valley.

This chapter will focus on the period from 26 May 1862 through 10 June 1862. The

content and format of this chapter will follow the model of the previous chapter. The first

chronological portion of this chapter will include nearly a week of operations in the lower

Valley--26 May to 31 May. The second part will include the escape of Jackson's army up the

Valley--1 June to 7 June. The final area of the chapter will focus on the twin battles of Cross

Keys and Port Republic, 8 to 10 June.

<u>Drive to the Potomac and Demonstrations in the Lower Valley</u>
(26 May - 31 May)

For the last six days of May, a primary focus of the war in the Eastern Theater was the

lower Valley. Leaders in both the Confederate and Union capitals concentrated their attention on

the activities of Jackson's army in the Valley. Each side attempted to exploit the recent events in

the Valley to its own advantage.

For his part, Jackson intended to use the situation in order to relieve Federal military

pressure on Richmond.[3] Jackson carried out Richmond's intent as described by General Robert

E. Lee on 16 May. "Drive him [Banks] toward the Potomac, and create the impression, as far as

practicable that you design threatening that line."[4] For his part, General Joseph Johnston added

clarification to this intent on 27 May: "I congratulate you upon new victories and new titles to

the thanks of the country and the army. If you can threaten Baltimore and Washington, do so. It may produce an important diversion."[5]

For their part, the Federals advanced two armies toward the Valley in an effort to trap Jackson in the lower Valley. Major General McDowell advanced 20,000 of his army from the east. In the west, Major General John Frémont hurried his 15,000-man army from the west. These two thrusts formed the tips of President Lincoln's pincer movement and were directed at the small Valley town of Strasburg.

Valley Army Operations

After the Battle of Winchester, Jackson's army spent 26 to 27 May in Winchester. For all of the twenty-sixth and the better part of the twenty-seventh, the main body of Jackson's army was inactive, taking well-deserved time off. Jackson's cavalry continued its pursuit of Banks. Ashby established his headquarters in Martinsburg, and Jackson made ready to continue his pursuit of Banks with the remainder of his army.[6]

Putting his army into motion in the afternoon of 27 May, Jackson surprised many under his command with his plans. Rather than withdraw up the Valley, Jackson continued his offensive to the north. In order to protect his flank, Jackson sent Colonel Zephanier T. Conner and his 12th Georgia Infantry Regiment to protect Front Royal. That evening, the Stonewall Brigade, minus the 27th Virginia Infantry Regiment, which remained in Winchester, prepared to move toward Charlestown.[7]

The main body of Jackson's army began to stir early on the twenty-eighth. Brigadier General Charles Winder, commander of the Stonewall Brigade, moved on Charlestown at 0500 hours. Like Conner, Winder's mission was to protect the operational flank of Jackson's army as Jackson prepared to continue his pursuit of Banks, now located at Williamsport.

Late in the afternoon on 28 May, Jackson received a telegram from General Joe Johnston that would shift Jackson's focus from Banks' shattered army. "The most important service you

can render the country is preventing the further strengthening of McClellan's army. If you find it too late for that, strike the most important body of enemy you can reach."[8] With this guidance and his knowledge of Federal efforts against him, Jackson now determined which Federal force was closest to him. Jackson's new target was Harpers Ferry, and orders were prepared for Ewell to follow Winder toward Charlestown.[9]

On the outskirts of Charlestown, Winder encountered about 1,500 Federal soldiers. The Stonewall Brigade, with the help of Chew's Battery, forced the Federals to withdraw. Winder's pursuit continued as far as Bolivar Heights, located a few miles west of Harpers Ferry. News of Winder's engagement reached Jackson early in the day. This information confirmed for Jackson that the Federal force at Harpers Ferry met Johnston's measure as the most important body of the enemy you can reach.

Late in the evening on the twenty-eighth, Jackson learned that Major General James Shields, functioning as McDowell's advance guard, was within one day's march of Front Royal. Jackson was at first skeptical of this report, and he continued with his move towards Harpers Ferry. (A move by Shields from his last known position to this new rumored location indicated an uncharacteristically quick move by Shields.)

By late evening on 29 May, Jackson had massed his army outside Harpers Ferry. During the day, Winder and Ewell conducted several skirmishes with Union soldiers on Bolivar Heights. Winder had also successfully occupied Loudoun Heights, a position across the Shenandoah River overlooking Harpers Ferry from the south.[10]

On 30 May, the Stonewall Brigade succeeded in occupying Bolivar Heights outside Harpers Ferry. Despite Winder's success, other events forced Jackson to abandon any thoughts of conducting a major operation at Harpers Ferry. Jackson received updates on the movements of both Frémont and Shields. By midday, Jackson's army, except Winder's Brigade and the

cavalry, was on its way to Winchester. Winder and the cavalry would continue to demonstrate against the Federals near Harpers Ferry to disguise Jackson's withdrawal.[11] (See Figure 13.)

By the evening of 30 May, Jackson's main body was back in Winchester. While on his trip back to Winchester, Jackson learned that Shields had successfully driven Conner's regiment from Front Royal. With this information, Jackson immediately dispatched Captain Hotchkiss to Harpers Ferry to deliver orders to Winder for him to expedite his retreat from Harpers Ferry.

As Jackson studied his map during the night, the risk to Jackson from the advancing Federals was quite serious. In the east, McDowell's advance guard was in Front Royal, only twelve miles east of Strasburg. In the west, Frémont's army was twenty miles west of Strasburg in Wardensville. Most of Jackson's army was in Winchester, eighteen miles north of Strasburg. Winder's Brigade was in Halltown, forty-three miles north of Strasburg. Would Jackson's army escape the focus of president's Lincoln's pincer trap at Strasburg? To do so, Jackson would have to get his army south of Strasburg before the jaws of the Federal trap closed. Jackson's move toward Harpers Ferry had been important to provide a realistic reason for the Federals to reposition forces north. Questions remained. Had Jackson taken too much time near Harpers Ferry? Would Jackson's army escape Lincoln's trap?[12]

Events on 31 May provided the answer to these two questions and in both cases the answer was "No." By noon on 31 May, most of Jackson's army had arrived in Strasburg. Jackson was able to establish defensive positions on the flanks of Strasburg in advance of the Federals' arrival. Winder's men were almost through the trap as well, having arrived late in the evening at Newtown, eight miles north of Strasburg. Winder's men had marched thirty-five miles in sixteen hours.[13]

As it turned out, even Winder and his brigade would escape south. In accordance with the maxim presented in this chapter's epigraph, Jackson's efforts in the lower Valley were sufficient to mislead and mystify his opponents. In particular, Secretary of War Stanton

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deployed numerous Federal forces to positions across the Potomac. By transferring many of

McDowell's army through Washington before sending them west, Stanton slowed their arrival in

the Valley sufficiently for Jackson to effect his escape.

<div align="center">Cavalry Operations</div>

To simplify this discussion, cavalry operations will be divided into several different

geographical areas. These areas include the east, west, northwest, and northeast. Whereas the

7th Virginia Cavalry operated in all of these areas, Steuart's cavalry was concentrated in the

northeast.

<u>East</u>

On the east flank of the Valley, elements of Ashby's 7th Virginia conducted flank

security for Jackson in the form of a flank guard operation. Since before the Battle of

Winchester, Jackson had heard rumors that McDowell was approaching Winchester from the

direction of Snicker's Gap. The security mission in this area was necessary to address that

potentiality. Initially, four companies of the 7th Virginia were involved in this operation. On 26

May, one company operated near Ashby's Gap and three operated from Front Royal. After

Colonel Conner's 12th Georgia took over flank security at Front Royal, all four companies of the

7th Virginia operated further to the north, with the exception of a small squad of cavalry that

remained near Front Royal. These four companies operated along the east side of the Valley,

from Ashby's Gap to Loudoun Heights.[14]

The activity of the Confederate cavalry elements east of the Shenandoah River continued

to fuel Union Brigadier General Geary's exaggerated reports of Confederate activity in the area.

From reports on the presence and activity of this cavalry company, Geary continued to make

ominous reports to Washington about the vulnerability of Loudoun County. He repeated his

report of a force of 30,000 moving towards Leesburg via Ashby's Gap.[15]

As a result of Geary's reports, several thousand Federals were dispatched to western Loudoun County to meet the threat imagined from the activities of Ashby's cavalry in that region. (Loudoun County is located east of Winchester along the road that runs from Winchester through Snicker's Gap to the small town of Leesburg.) The cavalry's flank guard mission continued from 26 to 31 May and did not end until Jackson's main body completed its withdrawal to Strasburg.[16]

After the arrival of the 12th Georgia in Front Royal, a cavalry squad continued to scout the area east of Front Royal. This squad provided information to both Conner and Jackson, as early as 28 May, on the approach of Shields. Despite the warnings, Conner did little to prepare for Shields' advance. Conner's poor handling of the tactical situation at Front Royal was not complicated by the lack of forewarning of Shields' approach.[17]

West

Ashby's western arm, which was screening against Frémont, began following Frémont's advance northward along the South Branch of the Potomac River towards Moorefield. Frémont's main body had departed Franklin on the twenty-fifth. On 26 May, this cavalry detachment, commanded by Captain Harry Gilmor, Company G of the 7th Virginia, skirmished with Frémont's rear guard near Franklin. After the skirmish, Gilmor and his men continued to closely follow Frémont's northward advance and continually supplied information to Jackson on Frémont's movements.[18]

Northwest

In the northwest, the Confederates continued to pursue part of Banks' cavalry. On the twenty-sixth, elements of the 7th Virginia prevented Colonel DeForest from crossing the Potomac River at any point east of Hancock, Maryland. The only possible Confederate force operating that far to the northwest on the twenty-sixth was the command of Captain MacDonald, Company D of the 7th Virginia. MacDonald had been pursuing DeForest since the morning of

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24 May. (MacDonald and his detachment had originally been part of Captain Myers' command demonstrating south of Strasburg on 24 May.)[19]

Northeast

The day after the Battle of Winchester, Ashby and Steuart continued their pursuit of Banks' army in the lower Valley. Steuart's command captured a large supply of stores left in Martinsburg by the fleeing Federals. The remainder of Ashby's command operated in the northeast portion of the Valley along with Steuart's cavalry. In this sector, Jackson's cavalry went in pursuit to a point a few miles south of Williamsport. Throughout the day, prisoners were sent to the rear.[20]

On 27 May, Colonel Ashby established his headquarters in Martinsburg. Both Steuart and Ashby operated from that central location. Jackson had still not selected an overall cavalry leader. Ashby continued to direct the activities of the 7th Virginia Cavalry while Steuart directed those operations peculiar to the 2nd and 6th Virginia Cavalry. In effect, Ashby's cavalry received orders directly from Jackson. Steuart's orders came through Ewell. Organizationally, Steuart's cavalry continued to function as Ewell's cavalry although they were operating for Jackson.

During this phase of the campaign, the labors of Congressman Alexander Boteler bore fruit for Ashby.[21] For months, Boteler had been campaigning for a generalship for Ashby. The Confederate Congress approved Ashby's promotion on 23 May. During the morning on the twenty-seventh, Ashby rode to Jackson's headquarters in Winchester and received his promotion to brigadier general.[22]

On 27 May, Colonel Thomas Munford, 2nd Virginia, returned from his trip to Richmond. After Munford's return, Steuart continued to direct operations for "Ewell's" cavalry. Under Steuart's orders, Colonel Munford commanded the operations of the 2nd Virginia and Colonel Thomas Flournoy commanded the operations of the 6th Virginia in the field.

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During this phase of the campaign, the 2nd Virginia was involved in several miscellaneous missions. Its primary focus was the destruction of rail and telegraph lines in the area. On the twenty-seventh, the 2nd Virginia destroyed a B&O Railroad bridge and depot near North Mountain, ten miles north of Martinsburg. On 28 May, the 2nd Virginia demonstrated in front of Banks from within a mile of Williamsport as Jackson shifted his focus in the direction of Harpers Ferry. On the twenty-ninth, the 2nd Virginia participated in the skirmish at Bolivar Heights. The 2nd Virginia Cavalry also provided assistance to the 2nd Virginia Infantry Regiment in its operation against Loudoun Heights, by taking the infantry across the Shenandoah River. At the conclusion of Jackson's activities near Harpers Ferry, the 2nd Virginia Cavalry moved with Jackson's infantry for Winchester on the thirtieth.[23]

For its part, the 6th Virginia conducted operations in the lower Valley. After the pursuit of Banks was completed on 26 May, the 6th Virginia also conducted miscellaneous missions to destroy infrastructure in the area. In addition, the 6th Virginia conducted security missions near Harpers Ferry and Williamsport. As Jackson's main body departed the lower Valley, the 6th Virginia conducted the rear guard mission, skirmishing with a portion of Banks' cavalry on 31 May near Martinsburg.[24]

Initially, the portion of the 7th Virginia operating near Winchester moved with Steuart on Martinsburg. They continued the pursuit of Banks to Williamsport. On the twenty-seventh, Ashby's men shifted their focus to the east. For three days, Ashby's men supported Confederate demonstrations near Harpers Ferry. The cavalry supported Winder near Charlestown on the twenty-eighth and again at Bolivar Heights on the twenty-ninth. Ashby's men were also active near Harpers Ferry on 30 May. Burke Davis, in *They called Him Stonewall*, describes an event during one of the skirmishes this way: "When the Federals had shot down his artilleryman, and a party of the enemy charged his field pieces, Ashby dismounted and, seizing a sponge-staff,

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loaded a gun and fired it into the midst of the oncoming men, until the survivors fled."[25] In the afternoon, Ashby followed Jackson to Winchester.

As Jackson moved his army from Winchester to Strasburg (31 May), Ashby conducted the advance guard. Jackson directed Ashby to "cut-off the Federal view at every roadway, every lane, every ford; engage the pickets, drive off the cavalry, do all possible to confuse Shields and Frémont and to delay their junction."[26] Ashby took his detachment of cavalry from Winchester towards Front Royal early on 31 May. Ashby's command was likely joined by a portion of the 7th Virginia that had previously been operating independently in the east. Ashby's cavalry skirmished with Shields' advance guard near Cedarville. With a force of cavalry and artillery, Ashby drove Shields' men from Cedarville and south of the North Fork. As Jackson's infantry entered Strasburg, Shields was bottled-up in Front Royal.[27]

The 7th Virginia detachment conducting the security mission west of Strasburg, Captain Gilmor's command, picked up the responsibility for the western arm of Jackson's advance guard. At that time, Captain Gilmor's command likely included the returning companies previously under Captain MacDonald's supervision. Included in the command was Chew's Battery. This portion of the 7th Virginia skirmished with advance elements of Frémont's army west of Strasburg in the evening. Even as the 7th Virginia skirmished with Frémont, Ewell's infantrymen moved into defensive positions northwest of Strasburg near Cedar Creek.[28]

Assessment of Cavalry

Security Missions

The cavalry continued to excel in the conduct of this mission, providing strong security across the entire Valley. For the entire phase, Ashby's detachments provided security through their conduct of a screening and outpost mission on the Valley flanks. The cavalry also conducted advance, rear, and flank guard missions in support of Jackson's movements in the lower Valley.

The success of Jackson's cavalry is remarkable given, among other things, the size of the enemy cavalry force arrayed against it. Banks' army consisted of more than 3,000 cavalry, Frémont's army more than 600 cavalry, and McDowell's army more than 1,900 cavalry. (McDowell's army consisted of more than 5,000 cavalry, but only Geary's 1,900 were operating directly against Jackson's flank during this phase.) Although not all of the cavalrymen were in a condition to ride, the Federals used an active mounted cavalry force of considerable size. Even if the Federals' attrition of the cavalry arm ran at 50 percent, the Federals were operating a cavalry force of more than 2,500 cavalrymen against Jackson's army. In cavalry alone, the Confederates' mounted arm was outnumbered more than two-to-one. Against this background, the accomplishments of Jackson's cavalry are even more significant.[29]

With a relatively small force, the 7th Virginia monitored the flanks of the Valley. Captain Gilmor prosecuted an aggressive mission west of the Alleghenies. A portion of Captain Myers' detachment contributed to the efforts of Gilmor from its position near Strasburg. The four companies of Ashby's cavalry left along the eastern flank were equally aggressive in their operations.

The operations along the eastern flank deserve special mention. More than any other, these companies contributed to the anxiety in Washington. Geary's reports led Secretary of War Stanton to send half of McDowell's army, almost 15,000 men, via Washington before going west to Front Royal. In addition, Geary burned thousands of weapons in anticipation of a Confederate advance east of the Valley. The efforts of Ashby's cavalry not only provided security for the east side of the Valley but also caused Washington to misdirect its resources.[30]

The cavalry also performed guard operations in order to fulfil its security missions. On 31 May, the cavalry was engaged in all quadrants around Jackson's army. The 6th Virginia skirmished with elements of Banks' cavalry near Martinsburg while the 7th Virginia skirmished

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with elements of Shields' and Frémont's armies. Despite the efforts of their enemies, the

Confederates prevented the Federals from penetrating any part of the Confederate screen.

Ashby's advance guard operation near Cedarville was especially important. Shields'

force was the closet to Strasburg. In addition, Shields was the most aggressive of the Union

commanders "hunting down" Jackson. Against Ashby, Shields sent out "one regiment of

infantry, some cavalry, and two pieces of artillery."[31] Ashby was able to thwart Shields' advance

and drive his enemy back to Front Royal. Not only did Ashby gain the field but he also caused

Shields to delay his advance toward Strasburg for another day while additional forces arrived in

Front Royal. The skirmish lasted more than several hours and ensured that Jackson's army did

not suffer a similar fate along the Valley Pike as received by Banks' army the week before.

Putting this skirmish in perspective, historian Robert Tanner stated that this skirmish "may have

been his [Ashby's] most valuable service of the war."[32]

Although not as contested as the fight at Cedarville, the skirmish west of Strasburg was

also important to the survival of Jackson's army. The cavalry in the west provided time for

Ewell's infantry to establish itself northwest of Strasburg. The security mission was successful,

and the cavalry was holding the line as Ewell's infantrymen took up its positions in support.

Information Missions

Although Jackson received information from a variety of sources, the information

provided by the cavalry was extremely important in this phase. Across every front, the cavalry

provided timely and accurate information to Jackson. The cavalry immediately notified Jackson

of the movements of Frémont in the west. The cavalry also warned both Conner and Jackson of

the early return of Shields in the east. The ease of Shields' entry into Front Royal was the fault

of Colonel Conner, not the cavalry. Colonel Conner failed to prepare for the advancing Shields

despite warnings from the cavalry. For abandoning Front Royal without even a fight, Jackson

placed Conner under arrest.[33]

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Miscellaneous Missions

Throughout this phase, the cavalry conducted numerous miscellaneous missions. Most of these were destruction missions. In the east, the destruction of the Manassas Gap Railroad bridges by Ashby's detachment out of Front Royal, completed before the arrival of Conner, delayed Shields' move east by more than one day. In the lower Valley, the cavalry was able to destroy a large amount of railroad infrastructure. It would take the Federals several months to repair all of the damage.[34]

Of particular importance was the destruction mission in the west. Conducted during the McDowell operation (chapter 5), this destruction played a pivotal role in this phase as well. On the twenty-forth, President Lincoln had directed Frémont to the Valley via Harrisonburg. Because of the thorough job done by the Confederate cavalry to block the roads into the Valley, under the direction of Hotchkiss, Frémont did not have the option of moving to the east. Frémont explained the situation to Washington: "Of the different roads leading from Franklin to Harrisonburg all but one had been obstructed by Jackson in his retreat. Bridges and culverts had been destroyed, rocks rolled down, and in one instance trees felled across the way for the distance of nearly a mile. The road still left open ran southwardly, reaching Harrisonburg by a long detour."[35] Of course, the only open road ran through Ashby's cavalry screen near McDowell. After ineffective probes of the cavalry screen, Frémont elected to move north. If not for the thoroughness of the Confederate blocking action, Frémont could have succeeded in closing Jackson's escape route down the Valley Pike. As it turned out, by forcing Frémont north, this cavalry mission allowed Jackson to slip past Frémont at Strasburg.

Final Thoughts

Jackson's cavalry distinguished themselves during this phase. In each of their missions, the cavalry provided invaluable service to Jackson's efforts. The cavalry significantly

contributed the operational success of this phase of the campaign and the ability of Jackson's army to escape the Federal trap at Strasburg.

Jackson Springs One Trap and Sets Another
(1 June - 7 June)

The retreat of Jackson's army from Strasburg initiated what was to be the final phase of the Valley Campaign. The Federals had committed more than 50,000 troops to capture Jackson in the lower Valley. As Jackson moved south, the geography of the Valley encouraged the Federals to continue to operate as two different armies. From Strasburg, Frémont pursued Jackson up the Valley. McDowell's army moved south, east of the Massanutten. Because many forces of McDowell's army had yet to arrive, Shields' division was the only element of McDowell's army prepared to move against Jackson. In a secondary role, elements of Banks' army moved behind Frémont to occupy Winchester and Strasburg after Frémont's division passed to the south. The three armies of Jackson, Frémont, and McDowell were, therefore, the primary antagonists for this final phase. (See Figure 14.) McDowell initially sent Shields after Jackson. Throughout this phase, additional elements of McDowell's army were transferred to Shields' command. In effect, Shields' force became an army of its own, albeit a subset of McDowell's army.

For the first week of June, Jackson moved his army up the Valley toward Harrisonburg. Heavy rains, clogged roads, and sheer fatigue took their toll on Jackson's army. Jackson's wagon train included 1,500 wagons which carried south more than $300,000 in captured supplies. (When the wagon train left Strasburg, the train, in double lines, was more than eight miles long when closed up.)[36]

Encouraged by Jackson's withdrawal, Frémont pursued Jackson with increased vigor. After Jackson began his advance south from Strasburg, McDowell transferred a brigade of his cavalry to Frémont. This cavalry brigade took up the mission as Frémont's advance guard.

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Brigadier General George D. Bayard commanded this cavalry brigade with a force mounting well over 1,000 sabers.[37]

For his part, Shields attempted to get behind Jackson by racing his army southward, east of the Massanutten. Shields' first plan was to enter behind Jackson at Luray. Shields' second plan was to enter behind Jackson at Conrad's Store. One step ahead of his foe, Jackson burned all the bridges across the Shenandoah north of Port Republic, thus preventing Shields from ever getting behind Jackson.[38]

Valley Army Operations

Ewell's infantry skirmished with Frémont's advance guard a few miles northwest of Strasburg early in the morning of 1 June. Although his artillery was active, the remainder of Frémont's army was not interested in engaging. Part of Ashby's command supported Ewell's infantry. Late in the afternoon, the last of Jackson's wagons had left Strasburg. Ewell withdrew toward Strasburg leaving Chew's Battery and the cavalry in charge of the rear guard on this side of the Valley.

The Maryland Line and Steuart's cavalry skirmished with elements of Bayard's cavalry force along the Front Royal road a few miles from Strasburg in the morning. The Confederates repulsed several Federal attempts to penetrate the screen. Late in the day, the Confederate infantry force withdrew leaving the cavalry to conduct the rear guard.[39]

The march up the Valley was extremely difficult for Jackson's weary army. Since reentering the Valley on 17 May, Jackson's infantry had marched over 170 miles in the ensuing two weeks.[40] Record rainfalls for May only aggravated the army's efforts to march south. Several recollections from those involved in this march provide the best description of the condition of Jackson's army during the first week of June. Captain Henry Kyd Douglas described the march along the Valley Pike this way: "Of course a thousand different obstacles impeded the movement of the train and consequently of the troops. One brigade divided another,

and generals and colonels were wandering through the mass in search of their commands."[41] A

soldier in Jackson's army remembered this march in his diary: "The road was shoe-mouth deep

in mud. My feet were blistered all over, on top as well as on the bottom. I never was so tired

and sleepy."[42] The month of May had been busy. The operations tempo of the Valley Campaign

was taking a toll on Jackson's army. The harsh weather only exacerbated the situation.

For the first three days of June, elements of Jackson's army--cavalry, artillery, and

infantry--skirmished with Frémont's advance guard. On 3 June, the last of Jackson's army

crossed the North Fork near Mount Jackson. On that day, the 7th Virginia burned the bridge

over the North Fork and established a position on Rude's Hill. Jackson's main body was a few

miles south near New Market.[43]

Early on 4 June, Frémont placed pontoons across the North Fork. A small infantry

detachment crossed the river. Early in the morning, a large downpour caused the river to rise

twelve feet in four hours, and only a portion of Frémont's cavalry got across the river. In order

to save the pontoons, Frémont took down the temporary bridge, and Jackson was afforded

additional time to widen the distance between his main body and Frémont's advance guard.[44]

While setting up his bridge across the river near Rude's Hill, Frémont's army had also

moved west to find an additional crossing site. In response to the movement of Frémont in that

direction, Jackson had placed some of his infantry in battle positions west of New Market near an

additional crossing site of the North Fork. The increased rainfall, working in Jackson's favor,

allowed Jackson to curtail this operation and to put his army back on the march. Frémont would

have to wait for the rain to stop in order to reestablish his bridge across the North Fork.

By the end of the day (4 June), Jackson's army was near Harrisonburg. The rear guard

continued to operate near New Market. Anticipating the approach of Shields in the east, Jackson

dispatched Captain Hotchkiss with some cavalry to the south peak of the Massanutten to

reconnoiter. From his position, Hotchkiss could provide updates on the advances of both Shields and Frémont.[45]

On 5 June, Jackson shifted his march southwest toward the small town of Port Republic. The bridge at Port Republic was the only major bridge still standing in the Valley. The bridges south of Harrisonburg, across the North and Middle Rivers, were still down. (These bridges had been destroyed by Jackson during the operations in the upper Valley nearly a month before.) Over the previous few days, the three standing bridges across the South Fork, near Luray and Conrad's Store, went up in smoke in accordance with Jackson's orders. Jackson was setting a trap of his own for his enemies. He planned to end his retreat at Port Republic. From there, he planned to defeat first Frémont and then Shields. By the evening, Jackson's army camped between Harrisonburg and Cross Keys.[46]

On 6 June, Jackson continued his withdrawal south. Most of Jackson's force, minus those of Ewell, moved to a point just outside Port Republic. Ewell's main body began to gather north of Cross Keys. Jackson's rear guard remained in Harrisonburg until about midday when Frémont's advance guard moved on the town. Jackson's rear guard withdrew to a small hill a few miles southeast of Harrisonburg.

In addition to the cavalry, Ashby's rear guard included artillery and some infantry. (As well as commanding the Confederate rear guard operation, Ashby had also assumed the role as Chief of Cavalry for all of Jackson's cavalry--including the men of the 2nd and 6th Virginia--on 2 June.) The infantry available to support Ashby included Colonel Scott's Brigade and the First Maryland Brigade, now commanded by Maryland Steuart. (Steuart had returned to his old command after Ashby assumed duties as Chief of Cavalry.)

The rear guard held a position on Chestnut Ridge a few miles southeast of Harrisonburg. In the afternoon, Frémont sent a large force of cavalry against the Confederate position. Frémont's force was defeated with significant losses. Toward sunset, another force--including

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more than a brigade of infantry and a regiment of cavalry--ventured south to secure the approach to Harrisonburg. A fierce skirmish ensued. In the end, the Confederates won the field.

The skirmish did not come without a high price. For the Confederates, their cavalry leader, Ashby, did not live to see victory. Ashby died leading his men on a charge against the Pennsylvania Bucktails. Command of the cavalry then shifted to Colonel Munford.[47]

On 7 June, Jackson's trap began to take shape. In order to meet Frémont, Ewell took up a strong defensive position four miles northwest of Port Republic. Jackson's own infantry and artillery gathered near Port Republic. Shields' army was camped near Conrad's Store. Frémont advanced his main body slowly from Harrisonburg. On the next day, Ewell's army would spring the first part of Jackson's trap against Frémont.

Cavalry Operations

For the cavalry, two particular missions were paramount among their responsibilities. First, the cavalry was to provide security to Jackson's tired army through the conduct of a rear guard security mission. Second, the cavalry needed to destroy the bridges across the South Fork in order to prevent Shields' army from getting behind Jackson. Successful execution of both of these missions was critical to the success of Jackson's plan of attack. For ease of discussion, each of these missions is considered separately here.

Mission Against Major General Shields' Army

On 1 June, Jackson assigned Ashby a special task to scout Page County, which included the town of Lurray, for the enemy and, if necessary, destroy at Luray, the White House and Columbia Bridges. (See Figure 1) Captain S. B. Coyner, Company D of the 7th Virginia, received his orders at about 1400 hours. The trip was a little over thirty miles and required the company to proceed across the Massanutten. Setting out immediately, the company was met by a courier at 2300 hours with specific orders to burn the two bridges at Luray. Coyner continued his trek to Luray despite the poor condition of his horses and the terrible weather.[48]

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Rain and hail pounded the Valley throughout the night. Many official reports near this date, both Federal and Confederate, mention the extreme weather. Corporal Neese and Captain Douglas record the terrible weather in their diaries. Frémont, now near Strasburg, reported hail the size of "hen's eggs." Experiencing the wrath of the same weather system, Coyner described it this way: "The rain.fell in torrents and the thunder rolled, and oh, the darkness, it was so thick I could almost clutch it in my grasp. But still we struggled on and my men clung to me like a parent. The safety of Jackson's army and perhaps our country demanded it, and though they suffered they seemed to suffer willingly."[49]

Despite the conditions, Coyner's cavalry torched the White House Bridge at 0400 hours on 2 June. At sunrise, the Columbia Bridge suffered the same fate. At the time Coyner burned the bridges, Shields had forces within ten miles of Luray, but they were not advancing south. At the very moment that Shields was informing Washington of his plans to secure the Luray bridges and advance into the Valley from the east, smoke was rising from the Columbia Bridge. Coyner ensured Shields was more than disappointed when he arrived at Luray in the morning on 3 June.[50]

Company D of the 7th Virginia rested in Page County on 2 June, but received additional orders from Jackson in the early evening. On 3 June, Company D moved south to Conrad's Store. Coyner arrived thirty minutes after a small band of Federals and burned the bridge immediately. The South Fork was not fordable this far north and the strong rains ensured that any passage must be by bridge. The burning of the three bridges over the South Fork by Coyner's men meant that there remained no bridges across the South Fork apart from the bridge at Port Republic. The operations of the cavalry in the east prepared part of Jackson's trap. Jackson would be able to focus his main effort against an isolated Frémont.[51]

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Mission Against Major General Frémont's Army

On 1 June, elements of both Shields' and Frémont's armies closed in on Strasburg. The cavalry operated in conjunction with part of Ewell's infantry to repel these advances. Steuart's cavalry supported the Maryland Line in the east and Ashby's 7th Virginia supported Taylor's Brigade in the west. (Shields' forces involved in these operations were limited to Bayard's cavalry. McDowell transferred this cavalry force to Frémont's army on this day.)

After Ewell withdrew most of his infantry late in the day, the cavalry conducted the rear guard operation. At this time, command of the rear guard operation fell was still in the hands of Steuart. (Ashby was not yet Chief of Cavalry.) In support of the cavalry, Jackson dispatched Taylor's Louisianans to help open up the distance between the main body and Frémont's advance guard. After 2200 hours, a small band of Federal cavalry penetrated the cavalry screen. At this point, the 6th Virginia held positions furthest north. By identifying themselves to members of the 6th Virginia as "Ashby's cavalry," the band of Federal cavalry penetrated past the 6th Virginia and into the next layer of Confederates, the 2nd Virginia. Jackson's report described the result of this penetration: "Disorder was also to some extent communicated to the 2nd Virginia , but its commander, Colonel Munford, soon reformed it, and gallantly drove back the Federals and captured some of their number."[52] Taylor's men also contributed to the work of the 2nd Virginia in repulsing the enemy. After the skirmish, Taylor continued his movement south. The rear guard stopped a few miles from Woodstock for the night.[53]

On 2 June, Steuart continued to direct the rear guard operation. Although the 7th Virginia was officially off duty on this day, some individual men supported the rear guard mission. Steuart divided his cavalry force by placing the 6th Virginia and 2nd Virginia on opposite sides of the Valley Pike. Several artillery batteries supported the operation from either side of the Valley Pike as well. At this time, the rear guard consisted mostly of cavalry and

artillery. The cavalry consisted of all the 2nd and 6th Virginia and part of the 7th Virginia. The exact size of the cavalry force is uncertain but was likely less than 1,000. [54]

Carefully watching the Confederate withdrawal, the Federals looked for an ideal opportunity to attack their enemy. At 1000 hours, the Confederates gave them their opportunity. With a force of 1,600 cavalry, the Federals attacked Steuart's rear guard as it was repositioning. The Confederates were ill prepared for this attack. Rather than retire his forces in echelon, Steuart had directed his entire force to withdraw simultaneously. All artillery was limbered at the moment of the Federal attack. The Federal charge stampeded the retiring Confederate cavalry. Colonel Munford described the situation in his after action report: "In executing this order, after we had gone but a few hundred yards, to my utter surprise I saw the battery and cavalry teeming together down the road pell-mell and the Yankees after them at full speed. The head of my column was under a hill, and as we came out of the woods a part of the 42nd Virginia Infantry Regiment, mistaking us for the Yankees, fired into my advance squadron, causing a stampede, wounding several."[55]

Relatively close when the Federals penetrated the Confederate rear guard, Ashby sprang into action. Quickly assessing the situation, he dismounted from his horse and solved the problem. According to Colonel Munford, "Here the gallant Ashby succeeded in rallying about 50 straggling infantry and poured a volley into the Yankee cavalry, emptying many saddles and giving them a check, clearing the road for the rest of the day."[56]

In the evening, Colonel Flournoy and Colonel Munford sought a transfer to Ashby's command. Hearing the report of the morning's activities, Ewell discussed the situation with Jackson. Jackson issued an order that relieved Steuart of cavalry command. Steuart returned to his previous brigade command. Ashby assumed command of all of the combined Confederate cavalry. Major Funsten moved up into command of the 7th Virginia.[57]

On 3 June, Ashby's cavalry continually prevented any attempt by the Federals to penetrate the Confederate screen. On this day, Ashby's men tenaciously held their ground, buying important time for Jackson to recover his wagon train across the North Fork. The bridge near Rude's Hill had become a bottleneck. Not until the last wagon had crossed did Ashby retire south of Mount Jackson. Ashby was one of the last men across the bridge as it was set on fire. The cavalry successfully completed Jackson's order to have the bridge burned.[58]

The cavalry continued its rear guard operation over the course of the next few days.[59] On 4 June, Ashby's men remained near Rude's Hill as Frémont attempted to cross the North Fork. On 5 June, Ashby retired to the vicinity of New Market as Frémont resumed his advance, skirmishing throughout the day. In the morning of 6 June, the rear guard moved to a position southeast of Harrisonburg.[60]

Copying its activities of 3 June, the rear guard needed to hold ground on 6 June. Similar to the Mount Jackson Bridge a few days before, the bridge at Port Republic was functioning as a bottleneck for Jackson's wagon train. The cavalry was not going to be able to trade ground for time on this day.

Holding a position on a hill a few miles southeast of Harrisonburg, the Federals decided to challenge the Confederates. At a little after noon, Colonel Percy Wyndham prepared a brigade of Federal cavalry to charge into the Confederate position.[61] Well aware of Wyndham's intentions, Ashby directed a countercharge against Wyndham. The fury of Ashby's countercharge overwhelmed the Federals. Ashby routed the Federals--killing thirty-six and capturing sixty-three, including the enemy colors. Of course, the biggest prize was Wyndham himself, who was among those captured.[62]

Aware of the increased aggressiveness of Frémont's advance guard, Ashby sent word to Maryland Steuart to send up some infantry to support the rear guard. With a similar attitude that he had on the twenty-fifth of May, Maryland refused to send forward his infantry without orders

from Ewell. Ashby took his request to Ewell who himself went with Steuart and the infantry to meet the enemy.[63]

Meeting Ewell, Ashby explained his plan to him. Ashby's plan was an ambush. The 2nd Virginia would position itself in the road as bait for a Federal attack. Confederate infantry, hidden in the woods on either side of the road would then pour deadly fire into the unsuspecting Federals as they advanced. Ewell approved the plan and directed the infantry into the woods.

Taking up their positions, the Confederates began the skirmish around sunset. The 1st Maryland Infantry Regiment took up its positions left of the road. Munford took his place in the road. Chew's Battery was further up the road shielded out of sight of the Federals by the cavalry. The 58th Virginia Infantry Regiment moved into its position to the right of the road. Ashby rode in front of the men of the 58th Virginia as it moved to its position in the woods.

The delay in the implementation of Ashby's plan was sufficient to allow the Federals to seize the initiative. The Federals were in the woods before the Confederates and surprised them by engaging them as they moved through. A regiment of the Pennsylvania Bucktails poured deadly fire into the Confederate right. The 58th Virginia commander had his horse shot out from under him and the 58th Virginia began to waiver. Assessing the situation, Ashby rode to rally the 58th Virginia. While doing this, Steuart began to bring forward the butternuts of the 44th Virginia Infantry Regiment to the aid of their fellow statesmen. Ewell also directed the 1st Maryland to the north to meet the infantry assault. The Confederate attack gained steam. Seeing a formation of Federal cavalry moving to support the Bucktails, Munford charged with his cavalry, driving it from the field. In the woods, the battle raged.

Ashby was everywhere, encouraging and animating his men, until at last his horse was struck by a bullet and he went down. Springing to his feet, and waving his sword over his head, he rushed forward, calling his men to follow. . . . "Forward my brave men."[64]

With that, the men of the 58th charged their adversaries and the Pennsylvanians were driven back. Not until after the confusion of the battle ended did the Confederates realize they had paid a high price for victory--Ashby was dead, killed instantly as he spoke his last command.[65]

The next day (7 June) was quiet in comparison to the day previous. The cavalry continued its rear guard mission but the Federals did not challenge them. Colonel Munford assumed command of Jackson's cavalry arm.[66]

<center>Assessment of Cavalry Operations</center>

Security Missions

By far, this mission dominated cavalry activities during this phase. The cavalry's execution of this mission was tenuous at first for several reasons. The fatigue of Jackson's men, the weather, and the length of Jackson's supply train combined to significantly slow the pace of Jackson's withdrawal. In addition, the Federals were able to get extremely close to Jackson's army before the withdrawal began. This complicated the situation for the cavalry.

The cavalry made several significant errors early in the withdrawal. They were surprised by the enemy on both June first and second. Steuart's leadership of the cavalry on 2 June smacked of incompetence. Munford provided a clear assessment of this situation: "Such management I never saw before. Had the batteries retired by *échelon,* and the cavalry in the same way, we could have held our position or driven back their cavalry by a counter-charge from ours. But a retreat was ordered and a disgraceful stampede ensued (emphasis is original)."[67] Steuart had proven himself incapable of leading the cavalry for the last time.

In addition to Steuart, Jackson was to blame for the situation of the cavalry organization. The dual command structure, which had existed in the cavalry since before the operations against Front Royal, made cavalry operations inefficient. This was partly responsible

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for the confusion among the cavalry on 1 June. The consolidation of the cavalry under Ashby improved the effectiveness of the cavalry.

Ashby's leadership was critical for the remainder of the rear guard operation. Jackson praised Ashby for his efforts to turn back the Federals on 2 June saying, "This led General Ashby to one of those acts of personal heroism and prompt resource which strikingly marked his character."[68] The cavalry was able to provide sufficient time for Jackson to withdraw across both the North Fork and South Fork without Federal harassment. On both 3 June and 6 June, the rear guard held its ground against the Federals. On both days, the countercharges by the cavalry were extremely effective. Both Ashby and Munford successfully thwarted attempts by the Federals to penetrate the Confederate rear guard on 6 June.

In hindsight, it would have been wise if the ambush attempt on 6 June had not occurred. Because of Steuart's delay, the opportunity for Ashby's plan had passed. With the day almost over, it is unlikely the Bucktails' advance would have amounted to much. The loss of fifty Confederates, including Ashby, achieved little.

Miscellaneous Missions

The burning of the bridges along the South Fork was no easy task. Despite extreme fatigue and weather, Captain Coyner successfully carried out his bridge-burning mission. This mission was critically important to Jackson's operations. If Shields had succeeded in getting behind Jackson at either Luray or Conrad's Store, the situation might have been even more than the mighty Jackson could overcome. Certainly, Jackson's wagon train would have met disaster. The bridge burning was also important because it forced the Federals into Jackson's trap where he could focus his army at each branch of the Federal thrust separately.

<u>Twin Battles</u>
(8 June - 10 June)

At the end of the campaign, Jackson's army fought the twin battles of Cross Keys and Port Republic on 8 and 9 June, respectively. Frémont was defeated at Cross Keys and Shields was defeated at Port Republic. On 10 June, Shields retreated to Luray and Frémont withdrew to the vicinity of Harrisonburg. Jackson rested most of his army near Port Republic, while the cavalry pursued Frémont to the north. The Valley Campaign was over.

Valley Army Operations

The Battle of Cross Keys began at 0900 hours as Frémont moved to meet Ewell. Ewell's army held a strong piece of ground and easily defeated the piecemeal Federal attack.[69] In the early afternoon, Ewell conducted a counterattack. By late afternoon, Ewell held Frémont's pre-battle positions. Frémont's participation in the Valley Campaign was finished.[70] (See Figure 15.)

During the early morning of 8 June, elements of Shields' advance guard succeeded in entering Port Republic, surprising Jackson. Most of Jackson's army was still sleeping just north of South Fork when the Federals arrived. Colonel Samuel Carroll, with a detachment of 150 cavalrymen of the 1st Virginia (Union) Cavalry Regiment stormed down the streets of the town at 0830 hours. (See Figure 16.) Carroll had orders from Shields to secure the bridge at Port Republic. Federal cavalry raced through the streets of Port Republic for nearly half an hour before order returned. Before the Confederates discovered the Federal cavalry, the Federals succeeded in bringing several artillery pieces within range of the Confederate camp. For a short time, the Federals actually controlled the only bridge across the South Fork. Jackson discovered the Federal cavalry and personally directed the Confederate response. In the end, the Confederates drove off the Federals and captured one of their cannons. However, maybe for the only time in his career, the enemy succeeded in surprising Jackson with its approach. For the

remainder of the day, with the exception of a few of Jackson's units, his army rested near Port Republic while Ewell's army defeated Frémont.[71]

On 9 June, Jackson moved his own forces south of the South Fork to attack a portion of Shields' army. In his haste to trap Jackson, Shields allowed his army to become too spread out. Only two of his three brigades were available for the fight against Jackson. Like Shields, Jackson had troubles of his own. Almost all of Jackson's army was north of the South Fork at the start of the day. The problem of crossing the river slowed Jackson's transfer of troops to meet Shields. In addition, a portion of Ewell's command was to join Jackson's effort against Shields. Jackson committed his first troops before his entire force was prepared for battle. Impatient, Jackson continued to commit his forces piecemeal. This gradual application of troops significantly hampered Jackson's attack.[72]

During the battle, Shields held a strong position on high terrain. In addition to the terrain, Shields had placed a significant number of artillery pieces that also strengthened his position. This slowed Jackson's infantry advance. The piecemeal application of forces nearly cost Jackson the battle. Initially, Jackson planned to use only a small force to defeat Shields. Once completed, Jackson had hoped to turn his full attention to Frémont--defeating both armies in one day. The lack of progress against Shields forced Jackson to commit even more of Ewell's force to battle against Shields. Before the battle was over, Jackson had abandoned his planned re-attack of Frémont. By early afternoon, the tide of the battle shifted to Jackson and Shields was defeated. (See Figure 17.)

In order to defeat Shields, Jackson had had to give up his position north of the South Fork. During the battle, Jackson shifted all of Ewell's force and his remaining supply wagons across the South Fork. Although Jackson achieved only half of his objective for the day, the day was a good one for the Valley Army.[73]

During the Battle of Port Republic, Frémont's army was idle and did not participate in the battle. Out of contempt or frustration, after the battle, Frémont's artillery fired several rounds at Jackson's ambulances as they were collecting both Confederate and Union dead on the battlefield, the yellow flags of the ambulances in full view.[74]

After Shields'. defeat, Jackson's army pursued. The infantry pressed Shields for three miles. The cavalry pursued an additional three miles. The pursuit yielded more than 450 of Shields' men.[75]

On 10 June, the Valley Campaign officially ended. Both Federal armies retreated. The cavalry crossed back over the South Fork in pursuit of Frémont. Colonel Munford followed Frémont closely and reoccupied Harrisonburg on the twelfth.

Cavalry Operations

On the morning of 8 June, Colonel Munford, still acting as Jackson's cavalry commander, positioned his cavalry on the right flank of Ewell's position. During the Battle of Cross Keys, the 2nd Virginia conducted a security and screen operation on Ewell's right flank along the McGaheysville road that ran toward that small town at the base of the Massanutten Mountain. Throughout the battle, the 2nd Virginia maintained its positions. The terrain of the battlefield was extremely wooded, and the only open area in the battle was in a steep ravine short of the Confederate defensive position.[76]

For their part, most of the 7th Virginia and all of the 6th Virginia were protecting the Confederate left. Their security mission ran across the Valley from Cross Keys and Port Republic toward Staunton. This security mission addressed the potentiality of a long-range raid by the Federals from that direction.

Several other companies were involved in miscellaneous missions. Two companies were guarding the supply trains near Port Republic--Captain G. W. Myers of the 7th Virginia and

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Captain J. J. Chipley of the 2nd Virginia. Company A of the 7th Virginia was on detail as an honor guard for Ashby, escorting his body from the Valley.[77]

Late in the evening of 7 June, Jackson received reports that elements of Shields' army were approaching from Conrad's Store. Jackson dispatched a small cavalry patrol, under command of Captain Sipe of the 7th Virginia. Sipe's mission was to gather information on Shields' advance force and report any information. Shortly after Sipe departed, Captain Myers and Company C of the 7th Virginia were sent out to support Sipe. Early in the morning, around 0600 hours, Sipe reported to Jackson, via courier, that he had encountered a Federal cavalry force of about 150 men a few miles north of Port Republic.[78]

Colonel S. S. Carroll commanded Shields' Federal advance. Carroll drove back Captain Sipe's small patrol to the south of Port Republic, before 0800 hours. Captain Myers, who had not been able to join up with Sipe, returned to Port Republic with Carroll's cavalry close behind. Myers informed the infantry sentry posted near the Port Republic Bridge about the approaching cavalry. Considering his job completed, Captain Myers made no effort to inform Jackson directly. Disgracefully, Captain Myers took his cavalry out of town and away from the action. Joining up with Captain Chipley in town, both cavalry companies rode off to an undisclosed location. The infantry sentries did not pass on the word to Jackson either. As Jackson rode through the streets of town, he was more than surprised to find Federal cavalry in possession of the southern end of the bridge across the South Fork with artillery commanding its approaches. Throughout the next half of an hour, Captain Sipe's cavalry joined one company of infantry operating in the southern part of the town. Together with this infantry, Sipe helped to secure the southern part of the town. Another Infantry Company, located in the town, and some Confederate artillery secured the northern part of the town[79]

In the evening of 8 June, Jackson directed Munford to conduct security south and east of Port Republic. "I desire you to ascertain at once if the road is open to Brown's Gap, and have a

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heavy picket under a reliable officer placed on the road from Brown's Gap to Conrad's Store."[80]

This was accomplished. Colonel Munford returned from his mission in the afternoon in time to join the pursuit of Shields' defeated army.

Major Cary Breckinridge of the 2nd Virginia performed the security mission from Brown's Gap to Conrad's Store. With two companies of cavalry, Breckinridge skirmished with the Federals until the battle was begun. Breckinridge held a good position on the field that allowed the infantry to cross over the South Fork beyond the range of the Federal artillery.[81]

At the end of the battle, Jackson committed his cavalry to the pursuit. The wooded terrain made the pursuit difficult. According to this official report, "The cavalry then pursued them about 8 miles, capturing about 150 prisoners, 6 or 7 wagons filled with plunder, and bringing off the field two pieces [of] artillery abandoned by the enemy, and about 800 muskets."[82]

After the twin battles were completed, Jackson rested his army near Port Republic. However, the cavalry was sent north to follow Frémont as he withdrew down the Valley. As the Valley Campaign ended, Jackson's cavalry accepted the responsibility for securing the upper Valley. Within a few days, Munford and his cavalry would remain as the only Confederate force in the Valley, as Jackson's army then moved to join General Lee in the now famous Seven Days Campaign.

Assessment of Cavalry Operations

The last few days of the Valley Campaign were clearly the worst, in terms of performance, for Jackson's cavalry. The difficulty of the last month had run down the cavalry significantly. The death of Ashby also reduced the ability of the cavalry. Yet, there are no excuses for the failures of the cavalry during these few days, particularly on the morning of 8 June.

Security Missions

As Chief of Cavalry, Colonel Munford failed to consider the vulnerability of Jackson's army to the approach of Shields. In his position, Munford should have show some initiative and placed part of his command on security missions well before Jackson sent a patrol out late on 8 June. It is understandable how Munford might fail to consider this in his first day on the job, but that is no excuse.

Captain Sipe performed his job adequately, given the size of his force, but the actions of Myers and Chipley are inexcusable. Jackson published a special order for his army that clearly assesses the action of these two cavalry companies.

> It is the painful duty of the Commanding General to announce to the army that on the 8th Inst. When in the Providence of God ours arms were so signally crowned with success, Captain G. W. Myers and Captain J. Chipley and their commands, at the mere approach of the enemy fled from anticipated danger, regardless of the fate of the gallant Army they so disgracefully deserted.[83]

The failure of the cavalry to place and conduct this security mission was a failure of the greatest order.[84]

Miscellaneous Missions

For his part, Captain Sipe performed well. He provided timely information to Jackson about the Federal advance. In fact, Hotchkiss states in his diary that it was the message from Sipe that started Jackson out of camp on the morning of 8 June. Captain Sipe also performed well in his actions on the south side of town. Colonel Carroll reported that part of the reason he abandoned the area was that the Confederates regained control of both the northern and southern parts of town.[85]

Battlefield Missions

The terrain of both battles was not conducive to cavalry operations. For this reason, the cavalry did not play a significant role on the battlefield. The pursuit of Shields after Port

Republic was successfully executed. Given the conditions, the wooded areas precluded a thorough pursuit.

Conclusion

It is unfortunate that the cavalry's final days in the campaign were marked with such poor performance. At times during this phase, the cavalry performed admirably. However, at times their performance was abysmal. Apart from the operation near Port Republic, the cavalry's greatest accomplishment was in the area of security. Several charges of the cavalry during the rear guard operation, particularly the one south of Harrisonburg, are commendable.

Several especially vital events also highlighted the cavalry's performance in this phase of the campaign. In particular, Steuart continued to fail in his position as a cavalry commander. The rear guard collapse of 2 June added to his previous failures on 24 May and the slow pursuit after the Battle of Winchester. The death of Ashby was another significant loss for the cavalry.

In conclusion, it is important to mention a failure of Jackson in relation to his cavalry arm. Jackson drove his infantrymen hard. He drove his cavalry even harder. Colonel Munford described the state of the cavalry toward the end of the campaign in his after action report:

> The weather had been extremely hot during our campaign in the Valley. The roads macadamized and the cavalry unprovided with horseshoes, and being compelled to subsist them mostly on young grass without salt, I found my command in a most deplorable condition. Our work had been eternal, day and night. We were under fire twenty-six days out of thirty. Having gone in with more than 100 men unarmed, we returned generally well equipped.[86]

Munford added to this information in a letter that he wrote home in which he said "at least one thousand horses are rendered unfit for duty by excessive work."[87]

At the end campaign, Jackson's effective cavalry was nearly nonexistent. It is fortunate, as far as the cavalry is concerned, that the campaign ended when it did. Certainly, leadership and discipline problems needed attention. Consideration of the physical state of the cavalry was even more important. It is unclear how well Jackson understood the toll his campaign had taken on

his cavalry. A fair reading of the record leaves one with the impression that Jackson knew his cavalry was "broken," but laid nearly all of the cavalry's shortcomings in the discipline column. In reality, the problem was much more complex than that. The failure of Jackson to grasp this reality represents a fundamental shortcoming of the otherwise overwhelmingly successful Jackson.

Throughout this phase of the campaign, Jackson remained in control. Despite his tenuous grasp on the situation at the beginning of this phase, Jackson kept one step ahead of his opponents. The twin battles at the end of the campaign showed how Jackson was able to mislead and surprise his opponents. In both cases, Jackson's army got the better of his antagonists, more so at Cross Keys than at Port Republic.

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[1] Darryl Lyman, *Civil War Quotations* (Conshohocken, PA: Combined Books, Inc., 1995), 124.

[2] Lyman, 124.

[3] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 12, part 3, 219-222. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted)

[4] *OR*, vol. 12, part 3, 892-893.

[5] Henry Kyd Douglas, *I Rode with Stonewall* (Chapel Hill, NC: University of North Carolina Press, 1940), 65.

[6] *OR*, vol. 12, part 1, 707; George M. Neese, *Three Years in the Confederate Horse Artillery* (New York: Neale Publishing Company, 1911); and Douglas, 60-63.

[7] *OR*, vol. 12, part 1, 707.

[8] Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 293.

[9] Tanner, 327; and *OR*, Vol. 12, part 1, 707.

[10] *OR*, vol. 12, part 1, 707.

[11] *OR*, vol. 12, part 1, 707; Douglas, 64-66; Jedediah Hotchkiss, *Make Me a Map of the Valley*, 3d ed. (Dallas, TX: Southern Methodist University Press, 1988), 49; William Allan, *Stonewall Jackson, Robert E. Lee, and the Army of Northern Virginia* (New York: Da Capo Press, 1995), 130; and Hearn, 105.

[12] *OR*, vol. 12, part 3, 277; and Allan, 131.

[13] *OR*, vol. 12, part 1, 708; and Tanner, 339.

[14] Tanner, 326. Tanner confirms that Conner assumed the flank security mission in Front Royal on 27 May.

[15] *OR*, vol. 12, part 3, 242.

[16] *OR*, vol. 12, part 3, 261, 265, 291.

[17] Lenoir Chambers, *Stonewall Jackson: The legend and the Man to Valley V* (New York: William Morrow and Co., 1959), 552; and Tanner, 335.

[18] *OR*, vol. 12, part 1, 518; and Tanner, 326.

[19] *OR*, vol. 12, part 1, 583-584.

[20] *OR*, vol. 12, part 1, 729-730.

[21] Boteler was a Confederate Congressman from northern Virginia. After the Virginia Governor instituted conscription, Boteler was commissioned as a colonel and served on Jackson's staff.

[22] James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 206.

[23] *OR*, vol. 12, part 1, 729-730.

[24] *OR*, vol. 12, part 1, 733, 535.

[25] Burke Davis, *They Called Him Stonewall* (Short Hills, NJ: Burford Books, Inc., 1954), 61.

[26] Davis, 64.

[27] Tanner, 337; and Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg,VA: H. E. Howard, Inc., 1992), 34.

[28] Armstrong, 34; Chambers, 557; and Neese, 62-63.

[29] *OR*, vol. 12, part 3, 308-312; and Appendix A.

[30] *OR*, vol. 12, part 2, 231-248.

[31] Neese, 63.

[32] Tanner, 337.

[33] *OR*, vol. 12, part 1, 725-733.

[34] *OR*, vol. 12, part 3, 293-294.

[35] *OR*, vol. 12, part 1, 11.

[36] Hotchkiss, 49-51; Allan, 116-117; and Colonel A. R. Boteler, "Stonewall Jackson in Campaign of 1862," *Southern Historical Society Papers*, vol. 42 (Carmel, IN: Guild Press of Indiana, Inc., 1999), 169. CD ROM. Jackson was unable to carry all of his captured supplies south. In particular, about $300,000 of equipment was burned in Front Royal. The total losses to Bank's army may have been over two million. *OR*, vol. 12, part 1, 707; and John E. Cooke, *The Life of Stonewall Jackson* (New York: Books for Libraries Press, 1863), 97.

[37] *OR*, vol. 12, part 3. This force of cavalry included the 1st New Jersey Cavalry Regiment, 1st Pennsylvania Cavalry Regiment, and the 1st Pennsylvania Rifles (Battalion).

[38] *OR*, vol. 12, part 3, 315, 325.

[39] Hotchkiss, 50-51.

[40] David Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1995), 202.

[41] Douglas, 71.

[42] Tanner, 348.

[43] *OR*, vol. 12, part 1, 712. The official records state that Ashby barely escaped across the bridge and had his horse killed. This was an accurate description for events near Rude's Hill in April, not June. This is one of several examples of flaws in Jackson's after action report for the Valley Campaign. This report was written long after the campaign--14 April, 1863--and provides one possible reason for the inaccuracy. Tanner, 352.

[44] Douglas Southall Freeman, *Lee's Lieutenants: Manassas to Malvern Hill* (New York: Charles Scribner's Sons, 1942), 426; and Allan, 138.

[45] Hotchkiss, 52.

[46] Hotchkiss, 52.

[47] *OR*, Vol. 12, part 1, 712; and Charles L. Dufour, *Nine Men in Gray* (Lincoln, NE: University of Nebraska Press, 1993), 73.

[48] *OR*, vol. 12, part 1, 711; Armstrong, 35; and Avirett, 210.

[49] Armstrong, 35.

[50] Armstrong, 35; and *OR*, vol. 12, part 3, 315, 325.

[51] Armstrong, 35-36.

[52] *OR*, vol. 12, part 1, 711.

[53] *OR*, vol. 12, part 1, 650, 711; Tanner, 346-348; and Neese, 64.

[54] *OR*, vol. 12, part 1, 729-730.

[55] *OR*, vol. 12, part 1, 731.

[56] *OR*, vol. 12, part 1, 731.

[57] *OR*, vol. 12, part 1, 712; Tanner, 350; and Avirett, 211.

[58] Avirett, 214; Neese, 65; and *OR*, vol. 12, part 1, 712.

[59] As an interesting aside, a story was written by one the Valley participants around this point in the campaign. Confederate staff officer John Esten Cooke came across a cavalryman who was sitting on the ground refusing to continue the withdrawal. When asked by Cooke why he was not moving, the cavalryman responded, "I can't go. I have just killed my brother and I don't feel I can fight anymore." It seems that the cavalryman had noticed, after he had cut down his opponent, that the foe had been his brother. Robert K. Krick, *Conquering the Valley: Stonewall Jackson at Port Republic* (New York, NY: William Morrow and Co., Inc., 1996), 13.

[60] Avirett, 214-215; 65-67.

[61] Colonel Percy Wyndham was the commander of the First New Jersey Cavalry Regiment. Wyndham was an English soldier of fortune. Wyndham's career included cavalry operations with several nations in Europe. For weeks, Wyndham had been boasting that he would "bag Ashby." He chose this moment to put his reputation on the line.

[62] *OR*, vol. 12, part 1, 712; and Avirett, 219-220.

[63] Tanner, 361.

[64] Avirett, 222-223.

[65] *OR*, vol. 12, part 1, 712; Avirett, 22-223; Neese, 68-70; and Tanner, 361-362.

[66] *OR*, vol. 12, part 1, 729.

[67] *OR*, vol. 12, part 1, 731.

[68] *OR*, vol. 12, part 1, 711.

[69] It is interesting to note that one of the Federal units that suffered the most in the battle was the Pennsylvania Bucktails. In the battle, the Confederates killed every Federal officer in the unit and obtained the Pennsylvania unit's colors. Ewell ordered the Confederate unit involved to fix a Bucktail to their unit colors as a decoration. The death of Ashby caused by this unit a few days before provides some explanation for the event.

[70] *OR*, vol. 12, part, 781-782.

[71] *OR*, vol. 12, part 1, 713.

[72] Martin, 173-175.

[73] *OR*, vol. 12, part 1, 714.

[74] Allan Tate, *Stonewall Jackson: The Good Soldier* (Nashville, TN: J. S. Sanders and Co., 1991), 160.

[75] *OR*, vol. 12, part 1, 714-715.

[76] *OR*, vol. 12, part 1, 732.

[77] Avirett, 235. It is of note, that this was Ashby's first trip from the Valley since the beginning of the war. Ashby has had arrived in Harpers Ferry the day after Virginia passed its article of Secession on 17 April 1861. From that moment on, Ashby rode with his command in constant defense of the Valley.

[78] *OR*, vol. 12, part 1, 712; and Tanner, 371-372.

[79] *OR*, vol. 12, part 1, 712; Tanner, 379; and Krick, 54-55.

[80] Krick, 284.

[81] Krick, 284.

[82] *OR*, vol. 12, part 1, 732.

[83] Krick, 55.

[84] There is nothing in the record about what punishment was actually given to the two cavalry companies. It is interesting to note that Captain Myers had been responsible for the well-executed demonstration south of Strasburg on 21 to 23 May.

[85] Hotchkiss, 53-54.

[86] *OR*, vol. 12, part 1, 733.

[87] Krick, 53.

CHAPTER 8

FINAL THOUGHTS

> Your recent successes have been the cause of the liveliest joy in this
> army as well as in the country.[1]

<div align="right">General Robert E. Lee, Official Records</div>

On 11 June, General Lee expressed the above message to Major General Thomas

Jackson after the twin battles in the upper Valley.[2] The movements and successes of Jackson's

Valley had not only weakened the Federal plans of attack against Richmond, but had also raised

the spirits of the people of the South. Along with this thought, General Lee expressed a desire

that Jackson might unite with Lee and arrange for simultaneous attack. In less than two weeks

after the end of the Valley Campaign, Jackson's army was again on the march, this time to join

with Lee in the Seven Days Campaign around Richmond. Upon marching out of the Valley,

Jackson's army left behind an indelible mark on the history of the war.

Introduction

In order to complete this study of cavalry operations, three questions need answering.

First, what is the answer to the thesis question? Second, what is the overall assessment of the

four building blocks of Jackson's cavalry force as outlined in chapter 3. The four building

blocks are leadership, organization, logistics, and tactics. Third, what lessons learned from this

segment of history have applicability for future military operations?

Thesis Question

Did Confederate cavalry operations significantly contribute to the success of the

Confederate 1862 Valley Campaign? The obvious answer is "yes," but of course, there are

never any simple answers. Depending on the measures of success, differing conclusions are

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possible. Two possible points of view are presented here, each point of view yielding a slightly different answer.

The first point of view for "measures of success" is from the perspective of the operational level of war. *FM 100-5, Operations*, defines the operational level of war this way:

> At the operational level of war, joint and combined operational forces within a theater of operations perform subordinate campaigns and major operations and plan, conduct, and sustain to accomplish the strategic objectives of the unified commander or higher military authority.
> The operational level of war is the vital link between national and theater-strategic aims and the tactical employment of forces on the battlefield.[3]

Based on this modern definition and from the operational level perspective, the measures of success in the thesis question then stem from the contribution of the cavalry to the operational level of war. More particularly, the measures of success stem from the contribution of the cavalry to the linkage between the tactical operations in the Valley and the Confederate national strategy.

Before the end of February, a primary Confederate national strategic objective was to prevent further invasion of its sovereign territory by the Unionists. After the Federal invasion in late February, this primary Confederate national strategic objective was more specifically focused on retention of the territorial integrity of the Confederate Capital at Richmond.

Without his cavalry, it would have been extremely difficult for Jackson to isolate his enemy and achieve the "vital linkage" of his army's tactical activities to the Confederate national strategic objectives. Jackson's cavalry performed numerous missions that proved invaluable to his ability to achieve this linkage. In particular, these missions allowed Jackson tactical surprise, numerical superiority, or created the credible perception of a greater threat than actually existed-- in other words, deception. Several of the more important missions that provided linkage at the operational level are listed.

1. The activities of the cavalry at Dam No. 5 on 1 and 2 January that distracted the Federals from Jackson's attack at Bath.

2. The occupation of Romney by the cavalry on 9 January that resulted from the Federal's misperception of the size of Jackson's approaching force.

3. The screening operation by Ashby during and after the Battle of McDowell that allowed Jackson tactical surprise against Brigadier General Robert Milroy.

4. The screening operation and deception conducted against Banks at Strasburg from 22 to 24 May that ensured Jackson surprised his enemy on 23 and 24 May.

5. The blocking of the passes and roads into the Valley from west of the Alleghenies that denied Frémont quick access into the Valley in late May.

6. The active screen and destruction missions east of the Shenandoah River during late May that caused confusion among the Federals as to Jackson's true intentions in the lower Valley.

7. The burning of the bridges over the South Fork in June that prevented Shields' quick access to the Valley.

In each of these cases, the cavalry performed missions that were critical to the vital linkage necessary at the operational level of war. In fact, three times Jackson used infantry in similar missions and it failed miserably--Hanging Rock in January, Bloomery Gap in February, and Front Royal in May.[4] Using an operational level of focus, the contribution of the cavalry to the Valley Campaign was extremely important, and each one of these missions significantly contributed to the success of various parts of Jackson's operational campaign.

The second point of view for measures of success is from the perspective of the tactical level of war. "At the tactical level of war, battles and engagements are planned and executed to accomplish military objectives assigned to tactical units or task forces."[5] The cavalry positively

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contributed at this level of war, but not with the same degree of success as at the operational level of war.

At the tactical level, the cavalry was more often successful operating away from the infantry battlefield than on it. In particular, the security operations of the cavalry were generally exceptional. The rear guard operation in March, after the Battle of Kernstown, likely saved Jackson's army from ruin. Although not as well executed, the rear guard operation in late May and early June prevented a major engagement that Jackson's army was ill prepared to execute. Many of the security operations performed by the cavalry, already mentioned in the operational level discussion, often had tactical implications as well. The holding of the Stony Creek line in April for two weeks was extremely important to Jackson's campaign because of the operational pause it allowed for the rebuilding of Jackson's army. The breakdown in security on the eve of the twin battles in June was likely the cavalry's worst event in the entire campaign. Despite this failure, the overall cavalry contribution to the campaign at the tactical level of war was still significant.

On the battlefield, the cavalry's contribution was not as significant. A combination of terrain and weapons technology diminished the role of the cavalry of the battlefield. In several battles, the terrain prevented any opportunity for cavalry involvement, McDowell or Cross Keys, for example. Because of the significant disorganization of Banks' army, the lost opportunity for an aggressive cavalry pursuit after the battle of Winchester stands out as the greatest cavalry blunder on the battlefield. The two greatest battlefield contributions were at Kernstown and Front Royal. In both cases, the cavalry was more successful on the battlefield than the infantry. On the battlefield, the cavalry's contribution was never a question of complete failure, but rather of missed opportunities.

In combination, the cavalry contributed successfully to both the operational and tactical levels of war. In fact, the execution of the missions that provided the "vital linkage" prevented

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large concentrations of cavalry on the battlefield. The contribution of the cavalry at the tactical level of war was generally not as significant. Using either point of view for the measure of success, one could conclude that the cavalry contributed significantly; however, the stronger case lies with the operational point of view.

Assessment of Four Building Blocks

Leadership

The discussion of leadership is limited to three primary leaders, each of whom affected Confederate cavalry operations in the Valley. As presented in chapter 3, these leaders are Brigadier General George "Maryland" Steuart, Major General Thomas "Stonewall" Jackson, and Brigadier General Turner Ashby.

Steuart

Maryland Steuart affected the Valley Campaign in a variety of ways. Largely because of Steuart's leadership, the Maryland Line performed admirably. Jackson often used the Marylanders in the advance. After returning to his infantry command, Steuart's Brigade distinguished itself in the Battle of Cross Keys. Seriously wounded during this battle, Steuart remained disabled for several months following the battle.

Steuart's leadership of the cavalry during the campaign was a different story altogether. Jackson's selection of Steuart to cavalry leadership was a monumental mistake. Steuart was ill suited to lead a large cavalry force. Steuart's decisions on several occasions to delay support until Ewell gave direction is still puzzling. Had Steuart not been a prominent member of a border state, it is likely, given Jackson's nature, disciplinary actions would have been taken against Steuart for his refusal to provide immediate cavalry support during the Battle of Winchester.

After the Valley Campaign, Steuart continued to lead his brigade. Steuart's Brigade was again conspicuous at the Battle of Gettysburg. On 12 May 1864, the Federals captured Steuart

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and a large part of his brigade at Spotsylvania's "Bloody Angle." After his repatriation, Steuart led a brigade in Pickett's Division through Appomattox.

Jackson

Stonewall Jackson distinguished himself throughout this campaign. For his part, Jackson excelled more at the operational and strategic levels than at the tactical level of war. At the tactical level, Jackson was often impatient and committed his forces before they were fully prepared. This occurred at the battles of Kernstown, McDowell, and Port Republic. Jackson's army was also poorly prepared for the Battle of Winchester, but it was better prepared than its demoralized and poorly-led adversaries. At the tactical level, the best-executed battle was that of Cross Keys and that was primarily Ewell's battle. This said, Jackson was not a poor tactician. Rather, his skill was greater at the operational and strategic levels of war.

Jackson's standards for conduct were extremely high. Fighting under Jackson, General A. R. Lawton described Jackson's character this way:

> He had small sympathy with human infirmity. He was a one-idea-ed [*sic*] man. He looked upon the broken down men and stragglers as the same thing. He classed all who were weak and weary, who fainted by the wayside, as men wanting in patriotism. If a man's face was as white as cotton and his pulse so low you could scarcely feel it, he looked upon him merely as an inefficient soldier and rode off impatiently. He was the true type of all great soldiers . . . he did not value human life when he had an object to accomplish. He could order men to their death as a matter of course."[6]

Lawton's assessment provides a good insight into the mind of Jackson. A similar view by Jackson toward the cavalry is likely. Jackson was prone to blame his subordinates' shortcomings on a lack of discipline. In point of fact, Jackson's cavalry did have discipline problems, but that was only one aspect of the cavalry's challenges. Greater problems existed in training, equipping, and leading the men. As Colonel Munford lamented, "I do not think that even General Jackson fully appreciated Ashby's troubles, because he complained of his disorganized command, and no order for the organization of his command was ever given until after Ashby was killed."[7]

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As the Valley Campaign ended, Jackson was a rising star in the Confederacy. Jackson's performance in the Seven Days Campaign did not rise to the standard he set for his army in the Valley. There are probably several reasons for this, but one factor was certainly the fatigue caused by operations in the Valley. Jackson and his army would recover and achieved greatness in future battles, such as Sharpsburg, Second Manassas, Fredericksburg, and Chancellorsville. It is appropriate that one of the greatest military triumphs of the Civil War, the Battle of Chancellorsville, would be both Jackson's greatest achievement and his final battle. It is also ironic that Jackson's enemy was unable to defeat him and that it was the bullets of his own men that tragically brought about the end of Jackson's life. In the end, Jackson's Valley Campaign stands as a long-lasting testament to Jackson as a military leader.

Ashby

Turner Ashby was a great combat leader. In today's parlance, Ashby excelled in direct leadership skills. Where Ashby was not as capable was likely in his organizational leadership skills. Still, it is difficult to measure the organizational leadership question because Ashby's staff was so small. Looking at the conditions under which Ashby operated, one is often reminded of the question of how much can one man do? Given the tools with which he operated the true measure of Ashby's success lies in what he was able to accomplish. Ashby's accomplishments were legendary and praise for his accomplishments came from many quarters. The following quotes are a sample and include, in order, comments from Colonel Munford, Federal Lieutenant Colonel Robert Kane of the Pennsylvania Bucktails, Major General Ewell, and Major General Jackson:

> I had the honor to serve with all of our best officers of the cavalry in the Army of Northern Virginia. I have the highest admiration and affection for most of them, and would not detract from the glory that any of them have, but venture this tribute to Ashby, because I believe he was the peer of any and deserves equal praise. He was as brave and as modest about it as Hampton, with all the dash and fire of Fitz. Lee or Steuart. Neither of them had a better eye for defence. [sic]They could not swoop down quicker when a flank was exposed or an opportunity given than he. They had better advantages in camp

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and by education, but he was a natural soldier, and had his life been spared, would have equaled Forrest in his boldest moves.[8]

When we found that the brave Ashby was slain, there was no rejoicing in our camps, though by it we had gained a great advantage, and I have not yet heard an unkind or injurious word by either officers or soldiers of our forces. . . .[9]

. . . . such a man [Ashby], with a good disciplined mounted regiment, and an infantry regiment attached to it, who could swing by a strap to each horse's neck, when "sharp, quick and devilish" work was wanted, would be equal to the best division in the army, and said he would rather have it [sic].[10]

An official report is not an appropriate place for more than a passing notice of the distinguished dead, but the close relation which General Ashby bore to my command for most of the previous twelve months, will justify me in saying that as a partisan officer I never knew his superior; his daring was proverbial; his powers of endurance almost incredible; his tone of character heroic, and his sagacity almost intuitive in divining the purposes and movements of the enemy.[11]

These praises serve as a good measure of the valuable service provided by Ashby to the

Confederate cause. Still, there was room for significant improvement in the cavalry.

Although Ashby died relatively early in the war, his accomplishments received high

praise and his persona became legendary. A brief discussion of this situation is necessary in

order to assess the accomplishments of Ashby. What conditions conspired to cause the growth of

Ashby's reputation? It seems that there are likely at least three primary reasons. These were

Ashby's leadership abilities, Ashby's tactical successes, and the period in which Ashby

succeeded.

General Ashby was an exceptional leader. As the aforementioned quotes indicate, his

reputation was secure in both Armies. Of course, Ashby's leadership went beyond battlefield

success. Not only was he a cavalryman with superior tactical expertise but also a man with a

distinguished character. Using today's set of Army values, he codified each value--loyalty,

discipline, respect, selfless service, honor, integrity, and personal courage. It is difficult to

identify, within Ashby's character, any particular flaw in relation to these values. Although

discipline within his unit was often questioned at the time, and routinely critiqued by historians,

it was never a personal shortcoming. The Army identifies the value of respect as the way in which one treats others. In terms of respect, Ashby was well ahead of his times. Drawing on the ideas of his father, Ashby treated others, including even his most-junior soldiers with respect. The value of respect, as doctrinally defined and expected in today's Army, was rare in Ashby's time. The constantly growing number of soldiers under his command, at a time when many southern units were loosing their men, is a good measure of Ashby's degree of appeal. Of course, it is important to keep things in perspective. Ashby was not a perfect leader, likely not the best leader, but certainly a member of the upper-echelon of military leaders in his day. This factor was one that contributed to his status in the South.

Everyone loves a winner. Ashby successfully led his men to victory. Time after time, Ashby got the better of his enemies. As Colonel Munford indicated, Ashby was routinely able to see and exploit the situation to his own advantage, either in the offense or on the defense. His courage was well known throughout the army, in not only Confederate but also Union circles. Ashby inspired his men with confidence in battle and nearly always "delivered the goods."

The final element of Ashby's reputation grew from the period in which he achieved his success. The Civil War is replete with examples of military genius and military success. In many cases, his accomplishments pale in comparison. Why then did Ashby's reputation stand out? The final contributing element to this phenomenon is rooted in the psyche of the Confederacy in the spring of 1862. Those were dark days for the Confederacy. Jackson's success in the Valley provided some of the rare successes for the Confederacy when tragic events were commonplace. In a society daily bombarded with bad news, Ashby's accomplishments as a part of Jackson's success, however small, became bigger than life.

At the time of his death, Ashby was a well-respected name in the Confederacy. His reputation was likely disproportionate to his accomplishments. None-the-less, the combination of his strong leadership and military successes were amplified by the nature of the Southern

condition in 1862, and his legend was born.

A better measure of his contribution may be found by examining what he left behind. Ashby's men went on the serve with distinction in the cause of the Confederacy. Reorganized on 16 June 1862, the old 7th Virginia grew into a brigade. The first ten companies were organized into the 7th Virginia Cavalry Regiment and became the first regiment of Ashby's Cavalry Brigade. The Confederacy organized the next ten companies into the 12th Virginia Cavalry Regiment, becoming the second regiment of Ashby's Cavalry Brigade. Five other companies formed a new cavalry battalion, the 17th Virginia Cavalry Battalion. This battalion became the 11th Virginia Cavalry Regiment in February of 1863. One company, under command of Captain W. R. Preston transferred to the 14th Virginia Cavalry Regiment.[12]

Under the new command of Colonel William E. "Grumble" Jones, the 7th Virginia Cavalry Regiment distinguished itself less than a month after Ashby's death. As the core of Ashby's old unit, the 7th Virginia received high praise form Brigadier General J.E.B. Steuart, then in command of Jackson's cavalry, for its action at Brandy Station on 20 August 1862. According to J.E.B. Steuart: "In the action at Brandy Station, Colonel Jones, whose regiment so long bore the brunt of the fight, behaved with marked courage and determination."[13] Although the men of Ashby's old command contributed to many Confederate actions throughout the remainder of the war, the success of the 7th Virginia on 20 August, coming so soon after Ashby's death, serves as a testament to Ashby's legacy.

Ashby's strength was his ability to bring out the best in his men. Ashby's influence on the battlefield was not limited to the cavalry. His ability to motivate the artillery at Harpers Ferry in May and the infantry stragglers on 2 June are but two examples. How much more would have been possible if the cavalry's organization, training, and subordinate leadership shortfalls did not exist?

Organization

Among the cavalry, several organizational issues continued to hamper operations. These included the nature of Ashby's command, the lack of organizational level leaders, and the dual cavalry chain of command after Major General Ewell's force joined Jackson's army.

The nature of Ashby's command created problems for both Jackson and Ashby. Throughout the course of the campaign, these problems remained unresolved. In particular, these problems were manifest in the organizational structure of Ashby's command.

The lack of organizational leaders in Ashby's cavalry hampered the effectiveness of the 7th Virginia Cavalry. Ashby functioned throughout the campaign with only one field grade officer, despite the fact that the command had grown to twenty-six companies. At the time of Ashby's death, Jackson had a list of field-grade officers for the 7th Virginia. The lack of organizational leaders led Jackson to doubt the ability of Ashby's companies to perform correctly without direct supervision. For this reason, Jackson often sent members of his staff on the cavalry missions. The 7th Virginia was critically short at least four field grade officers and numerous other junior officers for most of the campaign.[14] Had greater efforts been taken to get field graders into the 7th Virginia, the efficiency of the cavalry would have been greatly improved.

The final organizational issue was the dual cavalry chain of command. After Major General Ewell joined Jackson in the Valley, Jackson was slow to consolidate the operations of his cavalry. Until Jackson appointed Ashby as the Chief of Cavalry, problems of coordination reduced the effectiveness of the cavalry.

Tactics

The Valley Army's cavalry employed a number of uniquely innovative tactical techniques for cavalry operations. The integration of artillery into cavalry organizations was one of these innovations. The use of artillery in a cavalry advance was another. "It was Chew who

originated and repeated many times the feat of moving in the front line with the cavalry while charging."[15] The close coordination of the two arms in rear guard operations, plus infantry if Jackson assigned them to Ashby's command, may not have been new, but Ashby perfected it.

Logistics

The lack of logistical support severely reduced the efficiency of the cavalry. The Confederate's shortsighted solution of requiring each cavalryman to supply his own horse was a fundamental mistake. Once the war began in earnest, limited resources prohibited any change in policy. Colonel Thomas Munford, 2nd Virginia Cavalry explained the situation in a letter he wrote after the war was over:

> Another cause, not often considered or reflected upon, was that the cavalry furnished at first their own horses, and were required subsequently to furnish their own horses at their own expense. When a man was required to go or to come, his horse had to go or to come, too. When a machine is not greased or is improperly used, it will first creak and then refuse to move. When a horse is not fed, and given no time to rest, and forced in the charge, or on a raid, and forced in the retreat, he cannot perform his duty, and the man upon his back has to bear the censure.[16]

The longer the war lasted, the more this logistical reality reduced the effectiveness of the cavalry. Apart from the horses themselves, the lack of logistical support carried over into horse support. In particular, the inaccessibility of horseshoes and feed continually reduced cavalry effectiveness.

This thesis has already discussed the lack of arms for the cavalrymen. It is important to note the cavalry overcame these limitations, mostly through sheer determination and perseverance. What they could not get from Richmond, they simply took from their enemies. This, of course, is not the optimum solution, but it was the only solution available. The fact that the cavalry successfully executed this option is commendable and provides an excellent example of "rebel ingenuity."

Lessons for the Future

A number of important lessons can be learned from a close study of cavalry operations in the Valley Campaign. Many of these lessons still have merit today. As military organizations become leaner while operational requirements increase, the lessons of the Confederate cavalry may actually have even more applicability. Some of the more salient of these lessons are presented here.

Support the Soldier in the Field

The natural consequence of reduced manning levels and simultaneously increased tasking levels is increased operations and personnel tempo. Any soldier, sailor, airman, or marine of today can attest to the reality of this truth. What to do about it is an important question. The paradigm of the U.S. military presents little opportunity for the controlling of either of these two variables--manning levels or military tasking. Of course, senior U.S. military leaders should tackle these issues at the highest levels of civilian management. Assuming these two variables remain unchanged, how is the capability and efficiency of a military organization improved?

The study of the Valley Campaign provides one answer to this question. Given a set manning level, the government should provide the maximum level of logistical and organizational support in order to improve the efficiency of the fielded force. Jackson's cavalry constantly fought against a lack of support at home while fighting the enemy in the field. The lack of support manifested itself in both logistical and organizational areas. In 1862, the cavalry succeeded despite these failures, but paid a high price. This price was paid in reduced battle effectiveness, missed opportunities, overused equipment, and higher casualties.

As the Confederates discovered in 1861 at the beginning of their independence, effectively organizing the military during a time of intense conflict is extremely difficult, if possible at all. Military and civilian leadership must strive to develop a sound organizational

structure before the commencement of hostilities. In 1862, this lack of support was evident in varied organizational types, politically motivated leadership sel⋯ :ion, and disorganized chains of command.

Logistical support was also poor. The smaller or more heavily tasked unit can ill afford to battle in the field while unsupported from home. Expecting individuals to supply resources instead of supplying them from the organization is a recipe for disaster. Often times, the same constraints that led to lower manning levels and higher tasking levels lead to reduced logistical support. Forcing combat arms personnel to work outside of the system sidelines efficient effort away from combat tactics. In fact, as this 1862 example shows, logistical support requirements are even more important in this type of working environment.[17]

Innovation and Improvisation

In fact, these two ideas are central to any combat operation. Strict adherence to doctrine or past experiences often sows the seeds of defeat. Doctrine should not become dogma. Doctrine is important and forms a smart starting position, however, one should understand that all doctrine has shortcomings. Success in military operations stems from, among other things, recognizing the shortfalls in one's own doctrine and changing it before your opponent does the same in reference to his own doctrine. Michael Howard, the eminent British military historian, puts it this way: " I am tempted to declare dogmatically that whatever doctrine the Armed Forces are working on now, they have got it wrong. I am also tempted to declare that it does not matter that they have got it wrong. What does matter is their capacity to get it right quickly when the moment arrives."[18] As a means of initiating that change, innovation and improvisation have an important place in military operations. A proper balance of current doctrinal principles, with innovation and improvisation, is essential.

The Confederate cavalry in the Valley used innovation and improvisation numerous times throughout the campaign. Ashby's integration of cavalry and artillery was immediately

effective and the concept was eventually applied in both the Confederate and Federal armies and all theaters of war. Ashby mastered the use of combined arms at the tactical level. His closely coordinated rear guard operations are a prime example. Ashby perfected this operation. Other distinguished Confederate leaders would adopt his techniques, including cavalryman Jeb Stuart and artillerist John Pelham. Innovation and improvisation played a critical role in the success of the Confederate cavalry in the Valley. These changes were interwoven with other time-tested cavalry techniques.

In the future, military professionals would be wise to remember this lesson. No two tactical problems are the same. The nature of the problem and the resources available to solve it, more often than not, require some degree of innovation or improvisation. The soldier that can smartly apply these principles is well on his way to a good solution.

Leadership

The cornerstone of any military operation is leadership. This lesson is certainly not limited to the 1862 operation, but it bears repeating. A military organization must strive to build strong leaders. However, the reaction of men in battle is not the same as it is in peacetime. One may not know from what source or background its strongest combat leaders will come. The military organization must look for and embrace its leaders based on ability and not by any other measures.

Provide Tools for Leadership Development

Every leader has strengths and weaknesses. A military organization should cultivate the strengths of its leaders and attempt to offset any weaknesses. Provide the right tool for the job. In the Valley example, Ashby was a recognized combat leader. If there was a weakness in Ashby's leadership, it was likely in the area of non combat organization. To improve the cavalry leadership in this area, one solution might have been to ensure that Ashby received his full complement of organizational officers. The cavalry did have organizational problems; however,

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the cavalry's high operations tempo may have contributed as much to organizational problems as any leadership shortcomings did. How much work can one leader do? Leadership, at all levels, should look for ways to exploit the fullest leadership capabilities from each of his soldiers and look for ways to improve their effectiveness.

Training

Training is as important, if not more so, than actual combat. Not every person who receives training will see combat. Because one cannot predict with certainty those personnel who will be on the front line at the time of conflict, training becomes extremely important. Victory or defeat in combat, in most cases, is rooted in one's training. Military leaders must fight the tendency to ignore training, that has long-term benefits, in order to achieve short-term victories. Training must continue even in times of conflict. Some portion of potential combat capability must be removed from the front line in order to train. All military units will eventually fail if this principle is ignored. A modern example is the failure of the Japanese to continue to conduct pilot training during World War Two. Jackson and the Confederacy would have been better served by their cavalry if the tools and opportunity had existed for the training of the Southern cavalry. Today's military soldiers need not look farther than their own service in order to discover numerous examples of current operations dangerously eroding away critical training opportunities. Other than for extremely short time periods, there is no military mission that should preclude adequate levels of training. Failure to follow this maxim will certainly cost lives and likely victory. If practiced for long, this approach will certainly bring defeat.

Conclusion

The Confederate execution of the Shenandoah Valley Campaign is an excellent study in the operational art of war. For its part, Jackson's cavalry significantly contributed to the success of the campaign at the operational level. Confederate cavalry succeeded despite significant problems in the essential areas of leadership, organization, and logistics. The cavalry achieved

operational success by overcoming these problems, mostly through strong leadership, committed soldiers, and innovation. A study of Confederate cavalry operations in the Shenandoah Valley provides insight not only into military operations of the 1860s but also into military operations of the future.

As the U.S. Armed Forces meet the challenges of today and prepare for the challenges of tomorrow, it is important to remember a time-tested truth about military operations: the key variable to success is the soldier. A well lead and motivated soldier can accomplish the seemingly impossible, but even they have limitations. Exceeding this limitation can have dire consequences. One challenge of leadership is to know where the line is and how to operate near but not over it. Elements of the nature of this truth shine through in any study of the 1862 Valley Campaign. Looking toward the future, U.S. military leaders would be wise to remember the key variable to success, the soldier--how to achieve the impossible without exceeding the limit. General Lee, addressing his own operations tempo problems, professed words that ring true today:

> More than once have most promising opportunities been lost for want of men to take advantage of them, and victory itself has been made to put on the appearance of defeat, because our diminished and exhausted troops have been unable to renew a successful struggle against fresh numbers of the enemy. The lives of our soldiers are too precious to be sacrificed in the attainment of successes that inflict no loss upon the enemy beyond the actual loss in battle.[19]

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[1] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 12, part 3, 910. (Cited hereafter as *OR*, volume, part, and page number. All citations are Series I unless otherwise noted).

[2] It is important to remember that General Lee had replaced General Johnston because Johnston was wounded. Over the next few months, Lee would rename his army the Army of Northern Virginia. Jackson Valley's army would become an important element of that army. They would go on to glory, and eventually defeat, together.

[3] US Army, FM 100-5, *Operations* (Washington, DC: Department of the Army, 1993), 6-2. (Cited hereafter as FM 100-5).

[4] In January, Federal forces overran Confederate infantry forces while Jackson's main body was moving against Bath and Romney. In May, Federal forces overran Confederate infantry forces at Front Royal while Jackson's main body was threatening Harpers Ferry.

[5] FM 100-5, 6-3.

[6] Burke Davis, *They Called Him Stonewall* (Short Hills, NJ: Burford Books, Inc., 1954), 42.

[7] Brigadier General Thomas Munford, "Reminiscences of Jackson's Valley Campaign," *Southern Historical Society Papers* VII, reprint ed., (Carmel, IN: Guild Press of Indiana, Inc., 1999), 525. CD ROM.

[8] Munford, 528.

[9] James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 232.

[10] Munford, 529.

[11] OR., vol. 12, part 1, 712.

[12] Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg, VA: H. E. Howard, Inc., 1992), 37.

[13] Armstrong, 41.

[14] According to the *Troopers Manual*, a typical cavalry regiment, not counting any staff positions, included a colonel, a lieutenant colonel, and a major. In addition, each company had one captain and two lieutenants. Ashby's command had grown to over twenty companies, effectively two regiments. Ashby did not receive his promotion to Colonel until the end of March. In his command, Ashby had only one other field grade officer, Major Funsten. Each company had one captain, but not every lieutenant position was filled. Resultantly, Ashby's command was short four field grade, or higher positions, and an unknown number of other officer positions.

[15] Colonel A. R. Boteler, "Stonewall Jackson in Campaign of 1862," *Southern Historical Society Papers*, vol. 42 (Carmel, IN: Guild Press of Indiana, Inc., 1999), 126. CD ROM.

[16] Munford, 523.

[17] For the Confederate cavalry, the most significant example of this is the failure of the Confederate government to supply horses. There might be some modern day examples that may have the same effect. The requirement to have soldiers get a Master Degree "on the side," the reduction in health care benefits, the lack of training time or resources, the poor maintenance of

existing equipment, or the failure to upgrade military equipment are just a few possible examples.

[18] Scott Stephenson, Lieutenant Colonel and Dr. Christopher R. Gabel, "Introduction to Lesson 1," *Combat Studies Institute: Term I Syllabus / Book of Readings* (Fort Leavenworth: USACGSC, July 1999), 7.

[19] Darryl Lyman, *Civil War Quotations* (Conshohocken, PA: Combined Books, Inc., 1995), 137.

APPENDIX A

MAKE-UP OF ASHBY'S COMMAND

In order to assess the capability of Jackson's cavalry during the critical period of 23 to 25 May, it is important to know the constitution of the Cavalry. The purpose of this appendix is to recreate, from a variety of sources, the best possible constitution. With this information, any assessment of the cavalry during this particularly important three-day period becomes more credible.

In the case of the 7th Virginia Cavalry, several factors complicate the recreation of an accurate constitution. First, the organization of the 7th Virginia constantly changed throughout the campaign. Second, the operations of the campaign never allowed the 7th Virginia to consolidate in any one location because its operations routinely demanded that the unit maintain geographical separation. Third, the *Official Records* does not contain, for a variety of reasons, an accurate account of Colonel Turner Ashby's command. Fourth, the problem of maintaining the horses continually complicated the accurate measure of effective cavalrymen.

In addition, information on Major General Ewell's cavalry, the 2nd and 6th Virginia Cavalry, is included in this appendix as well. The information for the 2nd and 6th Virginia is easier to document because the units remained consolidated during the period in question. Additionally, specific references to unit size are included in the *Official Records*.

Where actual data is available, that is used. To make up for missing data, three logical assumptions are made. First, the organization of a cavalry regiment will follow the guidelines established in *The Trooper's Manual*. Second, the total company size is

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sixty-five men. Third, effective strength deducts a 30 percent attrition factor for sick, lame, or non-existent horses. The basis of each of these assumptions is included here.

The *Trooper's Manual* identified the regulatory requirements for each cavalry regiment. A confederate cavalry regiment included ten companies. According to the manual, a company included eighty men. A squadron includes two companies. Resultantly, a regiment might have five squadrons.[1]

The total company size is assumed sixty-five men. Two independent sources support this assumption. The first source is the work of John Thomason as presented in his book, *Jeb Stuart*: "I have not found a gray cavalry regiment that had more than 650 effectives. The regiments of 1862 would average about 500; in 1863, from 300 to 500, and after that, never above 350."[2] Because a cavalry regiment, according to Thompson research, never exceeded 650 men, each company in the regiment would average no more than sixty-five. The sixty-five man figure is also supported by the 7th Virginia's regimental history. In the muster roll taken 30 April 1862, the average company in the 7th Virginia numbered sixty-five.[3]

To arrive at the effective number of cavalry, the assumption attritts the regiment by 30 percent. The *Official Records* includes a large amount of Federal correspondence in which cavalry logistical issues are discussed. In addition, Federal documentation more accurately reflects more detail than Confederate reports in terms of effective versus non-effective cavalry. The official records of Major General Freemont, Major General Banks, and Major General Shields continually discuss the trials of maintaining their horses. Because these forces operated in and around the Valley, it is likely the Confederates faced similar degrees of difficulty maintaining their horses. The Federal records show that cavalry attrition was from 25 to 50 percent. Because the Valley was more familiar to the Confederates, a 30 percent attrition factor is applied.

23 May 1862

7th Virginia Cavalry Regiment

Cavalry Companies	Number of Men Total / Effective	Location[4]
10[5]	650 / 450	McDowell / Watching Freemont & Recovering from Operations
4[6]	260 / 180	S of Strasburg / Watching Banks
1[7]	65 / 45	Scouting Mission E of Strasburg
5[8]	325 / 225	Riding with Ashby / Buckton Station
1[9]	65 / 45	Couriers for Jackson
2[10]	130 / 90	Likely scouts for Jackson
Total = 23[11]	1495 / 1035	
	Chew's Battery[12]	South of Front Royal

2nd and 6th Virginia Cavalry Regiments

Cavalry Companies	Number of Men	Location[13]
5 (2nd)	325 / 250[14]	Front Royal
5 (6th)	325 / 250[15]	Front Royal

24 May 1862

7th Virginia Cavalry

Cavalry Companies	Number of Men	Location[16]
10	650 / 450	McDowell / Watching Freemont & Recovering from Operations
4	260 / 180	S of Strasburg AM / W of Strasburg PM
1[17]	45 / 30*	NE of Front Royal / Ashby's Gap
1	65 / 45	Couriers for Jackson , 16 on Scouting Mission E of Strasburg AM
2[18]	130 / 90	Riding with Funsten / N of Middletown
2[19]	130 / 90[20]	Riding with Ashby / Middletown
1	65 / 45	East of Front Royal / Watching Shields
2	130 / 90	Front Royal / Watching Prisoners/Equip
Total = 23	1495 / 1020	
	Chew's Battery[21]	Middletown AM / Newtown PM

2nd and 6th Virginia Cavalry Regiments

Cavalry Companies	Number of Men	Location[22]
5 (2nd)	299 / 224**	Newtown
5 (6th)	325 / 250	Newtown

* Figure is calculated by reducing the previous day's total by the fifteen Killed or wounded in the previous day's activities.[23]

** Figured is calculated by reducing previous day's total by the twenty-six killed or wounded in the previous day's activities.[24]

25 May 1862

7th Virginia Cavalry

Cavalry Companies	Number of Men	Location[25]
10	650 / 450	McDowell / Watching Freemont & Recovering from Operations
1	65 / 45	Strasburg / W of Strasburg
3	195 / 153	Continued pursuit of Federal Cavalry from Strasburg.
1	45 / 30	NE of Front Royal / Ashby's Gap
1	65 / 45	Couriers for Jackson , 16 on Scouting Mission E of Strasburg AM
4	260 / 180	Riding with Ashby / Winchester
1	65 / 45	East of Front Royal / Watching Shields
2	130 / 90	Front Royal / Watching Prisoners/Equip
Total = 23	1495 / 1020*	
	Chew's Battery[26]	South of Winchester

2nd and 6th Virginia Cavalry Regiments

Cavalry Companies	Number of Men	Location[27]
5 (2nd)	299 / 224*	SE Winchester
5 (6th)	325 / 250*	SE Winchester

* No casualty figures exist following the activities of 24 May. The numbers reflected here do not include casualty reductions from the previous day.

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[1] John W. Thomason, *Jeb Stuart* (London: C. Scribner's Sons, 1929), 79.

[2] Thomason, 79.

[3] Richard L. Armstrong, *7th Virginia Cavalry* (Lynchburg, VA: H. E. Howard, Inc., 1992), 95.

[4] James Avirett, a member of Ashby's staff, specifies the exact distribution of the 7th Virginia's cavalry companies. The distribution presented here follows his outline. James B. Avirett, *The Memoirs of General Turner Ashby* (Baltimore: Selby and Dulany, 1867), 198.

[5] Robert Tanner believes only three remained for duty. He believes the other seven moved with Jackson's infantry. The explanation provided by Avirett contradicts Tanner's conclusion. Avirett explained why so many companies remained in McDowell; the condition of the Confederate horses was poor. Federal reports in the *Official Record* give credence to Avirett's claim. For these reasons, ten companies are allocated to this location, instead of Tanner's assertion that the number was three companies. Robert G. Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 318.

[6] This activity follows the report of Avirett. (Avirett, 198).

[7] This activity follows the report of Avirett. (Avirett, 198).

[8] James Avirett specified that the number of companies that conducted this mission was five. (Avirett, 186). Richard Armstrong states that the number of companies in this mission was also five. (Armstrong, 30). Robert Tanner provides confirmation of the size of the force. According to Tanner, a Federal soldier at Buckton Station estimated the size of the Confederate force to range between 300 and 400 cavalrymen. (Tanner, 257). Using the muster rolls in the 7th Virginia regimental history, the number is 325. Thus, the actual muster roll validates the methodology resulting from the assumptions. (Armstrong, 95). Ashby's presence at Buckton Station is confirmed in the *Official Records*. (vol. 12, part 3, 702).

[9] The Official Records includes numerous references to mounted couriers. Robert Tanner references this fact as well. (Tanner, 218).

[10] This activity follows the report of Avirett. (Avirett, 198).

[11] William Allen corroborates Avirett's twenty-three company figure. William Allan, *Stonewall Jackson, Robert E. Lee, and the Army of Northern Virginia* (New York: Da Capo Press, 1995), 93.

[12] Chew's Battery did not engage this day. They were at the rear of army's march and did not accompany Ashby in the attack at Buckton Station. George M. Neese, *Three Years in the Confederate Horse Artillery* (New York: Neale Publishing Company, 1911), 55.

[13] Major General Ewell identifies in his official report that the companies operated near Front Royal. (OR, vol. 12, part 3, 702).

[14] Major General Ewell identifies in his official report that the 2nd and 6th Virginia Cavalry Regiments numbered 500 total effectives. (OR, vol. 12, part 3, 1851).

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[15] Major General Ewell identifies in his official report that the 2nd and 6th Virginia Cavalry Regiments numbered 500 total effectives. (OR, vol. 12, part 3, 1851).

[16] Avirett specifies the location of these companies. In Avirett's account, three companies are not mentioned. The *Official Records* mentions several cavalry companies that were operating near Front Royal. The three companies unaccounted for by Avirett are likely involved in the activities near Front Royal. (Avirett, 198).

[17] This number follows the distribution of forces on the previous day. Of the five companies riding with Ashby of 23 May, three groups are created for operations on 24 May. One company went north of Front Royal to Ashby's Gap. The remaining four companies are split between Colonel Ashby and Major Funsten.

[18] This number follows the distribution of forces on the previous day. Of the five companies riding with Ashby of 23 May, three groups are created for operations on 24 May. One company went north of Front Royal to Ashby's Gap. The remaining four companies are split between Colonel Ashby and Major Funsten.

[19] This number follows the distribution of forces on the previous day. Of the five companies riding with Ashby of 23 May, three groups are created for operations on 24 May. One company went north of Front Royal to Ashby's Gap. The remaining four companies are split between Colonel Ashby and Major Funsten.

[20] Both the Official Record and James Avirett specify that Ashby and Funsten conducted separate operations on 24 May. Major Funsten had the larger detachment. A number of men in Chew's Battery also identified that Ashby's command numbered no more than no more than 100 on the morning of 24 May. (Avirett, 198).

[21] Neese, 56-58.

[22] Jackson placed Brigadier George Steuart in command of the 2nd and 6th. Jackson sent Steuart to find Banks on the morning of 24 May. Steuart encountered Banks along the Valley Pike near Newtown. Both the reports of Major General Jackson and Lieutenant Colonel Flournoy support this fact. (OR, vol. 12, part 3, 703 34).

[23] Armstrong, 31; and Avirett, 189.

[24] OR, vol. 12, part 3, 734.

[25] Distribution remains mostly unchanged from day before. Ashby consolidates his force with that of Funsten for operations on this day. A cavalry force continues to pursue Federal cavalry north and west of Winchester following the activities of the previous day.

[26] Neese, 56-58.

[27] Steuart's location confirmed in Jackson's official report. (OR, vol. 12, part 3, 703).

APPENDIX B

SUMMARY OF PRINCIPLE EVENTS

The Summary of principle events is created from the *Official Records*.[1]

November 1861

4   --   Maj. Gen. Thomas J. Jackson, C. S. Army, assumes command of the

Valley District.

13   --   Skirmish near Romney, W. Va.

December 1861

8   --   Skirmish at Dam No. 5, Chesapeake and Ohio Canal.

8   --   Skirmish near Romney, W. Va.

17-21   --   Operations against Dam No. 5.

January 1862

3- 4   --   Skirmishes at Bath, W. Va.

4   --   Skirmishes at Slane's Cross-Roads, Great Cacapon Bridge,

Sir John's Run, and Alpine Depot, W. Va.

5   --   Bombardment of Hancock, Md.

7   --   Skirmish at Hanging Rock Pass (Blue's Gap), W. Va.

10   --   Romney, W. Va., evacuated by Union forces.

February 1862

7   --   Union forces reoccupy Romney, W. Va.

12   --   Skirmish at Moorefield, W. Va.

14   --   Affair at Bloomery Gap, W. Va.

March 1862

18   --   Skirmish at Middletown, Va

19	--	Skirmish at Elk Mountain, W. Va. Skirmish at Strasburg, Va.
20	--	Maj. Gen. Nathaniel P. Banks, U.S. Army, assumes command of the Fifth Army Corps. Skirmish at Philippi, W. Va.
22	--	Skirmish at Kernstown, Va.
23	--	Battle of Kernstown, Va.
25	--	Skirmish at Mount Jackson, Va.
29	--	Maj. Gen. John C. Frémont supersedes Brig. Gen. William S. Rosecrans in command of the Mountain Department

April 1862

1-2	--	Advance of Union forces from Strasburg to Woodstock and Edenburg
2	--	Skirmish at Stony Creek, near Edenburg, Va.
3	--	Skirmish at Moorefield, W. Va.
4	--	Departments of the Rappahannock (under Maj. Gen. Irvin McDowell) and of the Shenandoah (under Maj. Gen. N. P. Banks) constituted
7	--	Skirmish at Columbia Furnace, Va.
12	--	Major-General Banks, U.S. Army, assumes command of the Department of the Shenandoah.
16	--	Skirmish at Columbia Furnace, Va.
17	--	Occupation of Mount Jackson, skirmish at Rude's Hill, and occupation of New Market, Va.
19	--	Skirmish on South Fork of Shenandoah, near Luray, Va.
	--	Occupation of Sparta, Va.
21	--	Skirmish at Monterey, Va.
22	--	Harrisonburg, Va,, occupied by Union forces.
	--	Occupation of and skirmish near Luray, Va.

23	--	Skirmish at Grass Lick, W. Va.
24	--	Skirmish nine miles from Harrisonburg, Va.
26	--	Skirmish at the Gordonsville and Keezletown Cross-Roads Va
27	--	Skirmish at McGaheysville, Va.

May 1862

1	--	Skirmish at Clark's Hollow, W. Va.
	--	Skirmish on Camp Creek, in the Stone River Valley. W. Va.
5	--	Skirmish at Princeton, W. Va. Skirmish at Columbia Bridge, Va.
	--	Skirmish at Franklin, W. Va.
6	--	Skirmish at Camp McDonald and Arnoldsburg, W. Va.
	--	Skirmish near Harrisonburg, Va.
7	--	Skirmish at and near Wardensville, W. Va.
8	--	Battle of McDowell (Bull Pasture Mountain), Va.
9	--	Skirmish near McDowell, Va.
10-12	--	Skirmishes near Franklin, W. Va.
12	--	Skirmish at Lewisburg, W. Va. Skirmish at Monterey, Va.
15	--	Jackson's command returns from McDowell to Shenandoah Valley.
18	--	Skirmish at Woodstock.
21	--	Reconnaissance from Front Royal to Browntown.
23	--	Action at Front Royal. Skirmish at Buckton Station.
24	--	Frémont ordered to move from Franklin, W. Va., against Jackson.
	--	McDowell ordered to put 20,000 men in motion for the Shenandoah, &c.
	--	Skirmish at Strasburg, Middletown, Newtown.
24-26	--	Retreat of Banks' command to Williamsport, Md.
24-30	--	Operations about Harper's Ferry.

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| 25 | -- | Engagement at Winchester. |

| 26 | -- | Skirmish near Franklin, W. Va. |

| 27 | -- | Skirmish at Loudoun Heights. |

| 28 | -- | Skirmish at Charlestown. |

| 29 | -- . | Skirmish near Wardensville, W. Va. |

| 30 | -- | Action at Front Royal. |

| 31 | -- | Skirmish near Front Royal. Jackson's command retires front Winchester |

June 1862

| 1 | -- | Skirmish at Mount Carmel, near Strasburg. |

| 2 | -- | Skirmishes at Strasburg and Woodstock. |

| 3 | -- | Skirmish at Mount Jackson. Skirmish at Tom's Brook. |

| 6 | -- | Action near Harrisonburg. |

| 7 | -- | Skirmish near Harrisonburg. |

| 8 | -- | Reorg. of the Mountain Department and Department of the Shenandoah. |

| | -- | Battle of Cross Keys. Engagement at Port Republic. |

| 9 | -- | Battle of Port Republic. |

| 9 | -- | Shields' division ordered back to Luray, *en route* for Fredericksburg. |

| 11-12 | -- | Frémont's command withdrawn to Mount Jackson. |

| 12 | -- | Jackson's command encamps near Weyer's Cave. |

| 13 | -- | Skirmish at New Market. |

| 16 | -- | Skirmish near Mount Jackson. |

| 17 | -- | Jackson's command moves toward Richmond. |

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[1] *War of the Rebellion: A Compilation of the Official Records of the Union and Confederate Armies* (Washington, DC: Government Printing Office, 1880-1901; reprint, Carmel, IN: Guild Press of Indiana, Inc., 1997) Series I, vol. 5, 1-4, 388; and Vol. 12, part 3, 588.

APPENDIX C

ORDER OF BATTLE

Table 1. Methodology for Orders of Battle

Due to fragmentary documentation it is difficult to establish the precise composition and strength of the forces involved in the principal battles in the Valley Campaign. The figures which follow are based on a careful examination of the available evidence supplemented by some educated deductions. Normally the number of troops is given for each brigade, with total of killed, wounded, and missing/captured. Wherever possible, figures have been provided for lower level units as well. In addition, it has occasionally proven possible to determine the types of pieces used by individual artillery units and these have been indicated as appropriate. As a result, these figures are the most comprehensive ever published.

To facilitate the presentation of the orders of battle a number of conventions have been adopted. State abbreviations have been used and the ordinal ending has been left off most unit designations. All units are infantry regiments unless otherwise noted. Thus, "29 Oh" is the "29th Ohio Volunteer Infantry Regiment." For the cavalry (Cav), all units are regiments unless otherwise noted. In the artillery (Art), all units are batteries, technically belonging to a state regiment, as shown. Since Civil War practice was to call a battery by its commander's name, this has been given in parentheses. Where only a portion of a unit is known to have been involved, this has been indicated. Abbreviations and symbols used are as follows:

Btty—battery	m—missing
(always artillery)	nr—not reported
Coy—company	Sqn—squadron
c.—approximately	w—wounded
Det-detachment	>—number is the minimum
k—killed	?—unknown

Table 2. Battle of Kernstown - 23 March 1862 - Union Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
Union Forces, c. 7600	118	450	22	590
Brig. Gen. James Shields (w)	–			
Col. Nathan Kimball				
1st Brigade, c. 2200	45	200	1	246
Col. Nathan Kimball				
14 Ind ,	4	50	0	54
8 Oh	11	41	1	53
67 Oh	9	38	0	47
84 Pa	21	71	0	92
2nd Brigade, c. 2200	23	69	0	92
Col. Jeremiah Sullivan				
39 Ill	0	0	0	0
13 Ind	5	37	0	42
5 Oh	18	32	0	50
62 Oh	0	0	0	0
3rd Brigade, c. 2400	43	171	21	235
Col. Erastus D.Tyler				
7 Ind	7	33	9	49
7 Oh	20	62	10	92
29 Oh	3	10	2	15
110 Pa	7	43	0	50
1 WVa	6	23	0	29
Cavalry Brigade, c. 300	3	6	0	9
Col. Thornton Brodhead				
1 Pa Cav (1 sqn)				
Md Cav (2 coys)				
1 WVa Cav Bn				
1 Oh Cav (A, C Coys)				
1 Mich Cav (1 bn)				
Artillery, c.50	4	2	0	6
Lt. Col. Philip Daum				
Btty A, WVa Art (Jenkins)	1	0	0	1
Btty B, WVa Art (?)	0	0	0	0
Btty H, 1st Oh Art (Huntington)	1	0	0	1
Btty L, 1st Oh Art (Robinson)	1	2	0	3
Btty E, US 4th Art (Clark)	1	0	0	1

Source: Reprinted, by permission of the publisher, from David G. Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1994), 204.

Table 3. Battle of Kernstown - 23 March 1862 - Confederate Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
CONFEDERATE FORCES, c.3200	80	375	287	718
Maj. Gen. Thomas J. Jackson				
Garnett's Brigade, c. 1500	40	168	153	361
Brig. Gen. Richard S. Garnett				
2 Va, 320	6	33	51	90
4 Va, 203	5	23	48	76
5 Va, c. 300	9	48	4	61
27 Va, c. 200	2	20	35	57
33 Va, 275	18	27	14	59
Rockbridge Va Btty, 8 guns & c. 50 (McLaughlin)	0	10	1	11
West Augusta Va Btty, 4 guns & c.90 (Waters)	0	7	0	7
Carpenter's Va Btty, 4 guns & 48	0	0	0	0
Burks' Brigade, c.700	24	114	39	167
Col. Jesse Burks				
21 Va, 270	7	44	9	60
42 Va, 293	11	50	9	70
48 Va, unengaged				
1 Va Bn, 187	6	20	21	47
Pleasant's Va Btty, 4 guns & c.50	0	0	0	0
Fulkerson's Brigade, c.650	15	76	71	162
Col. Samuel Fulkerson				
23 Va, 177	3	14	32	49
37 Va, 397	13	62	39	113
Danville Va Btty, 4 guns & c. 50 (Lanier)	0	0	0	0
Cavalry, c. 340	1	17	0	18
Col. Turner Ashby				
7 Va Cav 290	1	17	0	18
Chew's Va Btty, 3 guns & c.50	0	0	0	0

Table 4. Battle of McDowell - 8 May 1862 - Union Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
UNION FORCES, c. 6000, 2268 engaged	26	227	3	256
Brig. Gen. Robert Schenck				
Milroy's Brigade, c. 1768 engaged	20	177	3	199
Brig. Gen. Robert Milroy				
25 Oh, 469	6	51	1	58
32 Oh, 416	4	52	0	56
73 Oh, unengaged				
75 Oh, 444	6	32	1	39
2 WVa, unengaged				
3 WVa, 419	4	42	0	46
Btty, I, 1 Oh Art (Hyman), unengaged				
12 Oh Art Btty (Johnson), unengaged				
1 WVa Cav, unengaged				
Schenck's Brigade, c. 750	6	50	1	57
Brig. Gen. Robert Schenck				
55 Oh, unengaged				
83 Oh, c. 500	6	50	1	57
5 WVa, unengaged				
Btty K, 1 Oh Art (DeBeck), unengaged				
1 Conn Cav, c.250	0	0	0	0

Table 5. Battle of McDowell - 8 May 1862 - Confederate Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
CONFEDERATE FORCES, C. 6000	75	423	0	498
Maj. Gen. Thomas J. Jackson				
The Army of the Valley	12	98	0	110
Maj. Gen. Thomas J. Jackson				
2nd Brigade—Col. John Campbell	0	9	0	9
21 Va	0	1	0	1
42 Va	0	3	0	3
48 Va	0	4	0	4
1 Va Btty (?)	0	1	0	1
3rd Brigade—Brig. Gen. William Taliaferro	12	89	0	101
10 Va	1	20	0	21
23 Va	6	35	0	39
37 Va	3	34	0	39
Army of the Northwest	63	325	0	388
Brig. Gen. Edward Johnson (w)				
1st Brigade—Col. Z.T. Conner	43	223	0	266
12 Ga, 540	35	140	0	175
25 Va	7	65	0	72
31 Va	1	18	0	19
2nd Brigade—Col. W.C. Scott	20	62	0	122
44 Va	2	17	0	19
52 Va	7	46	0	53
58 Va	11	39	0	50

Source: Reprinted, by permission of the publisher, from David G. Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1994), 206-207.

Table 6. Battle of Front Royal /Winchester - 23 to 25 May 1862
Union Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
UNION FORCES, c. 6500	62	243	1714	2019
Maj. Gen. Nathaniel P. Banks				
1st Division	51	201	1287	1541
Brig. Gen. Alpheus Williams				
1st Brigade, 1700—Col. Dudley Donnelly	17	98	735	850
5 Conn	1	12	71	84
1 Md	14	43	535	592
28 NY	0	2	62	64
46 Pa	2	43	65	110
3rd Brigade, 2102—Col. George H. Gordon	22	80	507	609
2 Mass	13	47	80	140
27 Ind	3	17	104	124
29 Pa	2	5	237	244
3 Wis	4	11	86	101
Cavalry Brigade, 700+—Brig. Gen. John P. Hatch	5	25	294	324
1 Md Cav, c. 300	0	0	5	5
1 Me Cav	0	1	128	129
5 NY Cav, c. 200	4	15	56	75
1 Vt Cav, c. 200	1	9	105	115
Miscellaneous, c. 380	12	24	46	82
1 Mich Cav, c. 200	10	10	34	54
Btty M, 1st NY Art, 6 guns & c. 60 (Best)	2	4	5	11
Btty F, Pa Art, 4 guns & c. 60 (Hampton)	0	7	4	11
Btty F, US 4 Art, 4 guns & c. 60	0	3	3	6
Unattached	6	17	135	154
10 Me, 856	3	6	54	63
Pa Zouaves D'Afrique, 120	1	1	2	4
8 NY Cav, c.300	2	5	24	31
Btty E, Pa Art	0	5	23	28

Source: Reprinted, by permission of the publisher, from David G. Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1994), 208-209.

Table 7. Battle of Front Royal /Winchester - 23 to 25 May 1862
Confederate Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
CONFEDERATE FORCES, c. 15,000	68	329	3	400
Maj. Gen. Thomas J. Jackson				
Jackson's Division				
Maj. Gen. Thomas J. Jackson				
1st Brigade, 1529 +	10	27	0	37
Brig. Gen. Charles Winder				
2 Va	4	14	0	18
4 Va	0	0	0	0
5 Va	1	3	0	4
27 Va	1	3	0	4
33 Va	1	7	0	8
2nd Brigade	2	14	0	16
Col. J.A. Campbell				
21 Va	0	0	0	0
42 Va	0	3	0	3
48 Va	2	7	0	9
1 Va Bn	0	4	0	4
3rd Brigade	2	34	0	36
Col. Samuel Fulkerson				
10 Va	1	8	0	9
23 Va	0	7	0.	7
37 Va, c. 300	1	19	0	20
Artillery	3	21	0	24
Col. Stapleton Crutchfield				
Carpenter's Va Btty, 4 guns	1	5	0	6
Caskie's Va Btty, 4 guns	0	0	0	0
Cutshaw's Va Btty, 4 guns	0	0	0	0
Poague's Va Btty, 6 guns	2	16	0	18
Wooding's Va Btty, 4 guns	0	0	0	0
Ewell's Division	43	184	3	230
Maj. Gen. Richard S. Ewell				
2nd Brigade	0	0	0	0
Col. W.C. Scott				
44 Va	0	0	0	0

Table 7 -- Continued.

	KILLED	WOUNDED	MISSING	TOTAL
52 Va	0	0	0	0
58 Va	0	0	0	0
4th Brigade	0	0	0	0
Brig. Gen Arnold Elzey				
12 Ga	0	0	0	0
13 Va	0	0	0	0
25 Va	0	0	0	0
31 Va	0	0	0	0
7th Brigade	22	75	0	97
Brig. Gen. Isaac Trimble				
15 Ala.	0	0	0	0
21 Ga	1	16	0	17
16 Miss	0	0	0	0
21 NC	21	59	0	80
8th Brigade	21	109	3	133
Brig. Gen. Richard Taylor				
6 La	5	42	3	50
7 La	5	12	0	17
8 La	0	0	0	0
9 La	5	37	0	42
1 La Bn	1	6	0	7
Maryland Line	0	0	0	0
Brig. Gen. George Steuart				
1 Md	0	0	0	0
Baltimore Btty, 4 guns (Brockenbrough)	0	0	0	0
1 Coy Md Cav	0	0	0	0
Artillery				
Latimer's Va Btty, 6 guns				
Lusk's Va Btty, 4 guns				
Raines' Va Btty, 4 guns				
Rice's Va Btty, 4 guns				
Cavalry	11	15	0	26
Brig. Gen. Turner Ashby				
2 Va Cav				
6 Va Cav				
7 Va Cav				
Chew's Va Btty, 4 guns				

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Table 8. Battle of Cross Keys - 8 June 1862 - Union Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
UNION FORCES, c. 14,150	>114	>443	>127	>684
Maj. Gen. John C. Frémont				
Blenker's Division, c. 6450	>81	>295	>106	>482
Brig. Gen. Louis Blenker				
1st Brigade, 2750	68	239	90	397
Brig. Gen. Julius Stahel				
8 *NY*, 548	43	134	43	220
39 *NY*, c. 500	4	28	12	44
41 *NY*, c. 500	1	8	11	20
45 *NY*, c. 500	3	6	10	19
27 *Pa*, c. 500	17	61	14	92
2 *NY Btty*, c. 100 (Schirmer)	0	0	0	0
Btty C, WVa Art, c. 100 (Buell)	0	2	0	2
2nd Brigade, c. 1600—Col. John Koltes	0	1	8	9
29 *NY*, c. 500	0	1	6	7
68 *NY*, c. 500	0	0	2	2
73 *Pa*, c. 500	0	0	0	0
13 *NY Btty*, c.100	0	0	0	0
3rd Brigade, c. 1700—Brig. Gen. Henry Bohlen	13	52	8	73
54 *NY*, 373	1	4	0	5
58 *NY*, c. 400	7	18	4	29
74 *Pa*, c. 400	3	11	1	15
75 *Pa*, 375	2	16	3	21
Btty I, 1 NY Art, c. 100 (Wiedrich)	0	3	0	3
Divisional Cavalry, c. 400	0	0	0	0
4 *NY Cav*, c. 400	0	0	0	0
Advance Brigade, c.800 Col. Gustave Cluseret	4	12	3	19
60 *Oh*, c. 400	3	4	0	7
8 *WVa*, c. 400	1	8	3	12
Milroy's Brigade, c. 2500 Brig. Gen. Robert Milroy	24	122	14	160

Table 8 -- Continued.

	KILLED	WOUNDED	MISSING	TOTAL
2 *WVa*, c. 500	3	19	2	24
3 *WVa*, c. 500	4	23	0	27
5 *WVa*, c. 500	9	38	0	47
25 *Oh*, c. 500 .	6	40	5	51
1 *WVa Cav*, c. 200	0	0	7	7
Btty G, WVa Art, c. 100 (Ewing)	0	1	0	1
Btty I, 1 Oh Art, c. 100 (Hyman)	1	1	0	2
12 Oh Btty, c. 100 (Johnson)	1	0	0	1
Schenck's Brigade, 2436	4	7	4	15
Brig. Gen. Robert Schenck				
32 Oh, 500	0	1	0	1
55 Oh, 525	0	0	0	0
73 Oh, 295	4	3	0	7
75 Oh, 444	0	0	0	0
82 Oh, 374	0	2	0	2
1 Conn Cav, 113	0	0	4	4
Btty K, 1 Oh Art, 94 (DeBeck)	0	0	0	0
Rigby's Ind Btty, 91	0	1	0	1
Bayard's Cav Brigade, c. 1350	1	7	0	8
Brig. Gen. George Bayard				
1 *NJ Cav*, c. 500	0	0	0	0
1 *Pa Cav*, c. 600	0	0	0	0
13 *Pa Inf* (one bn), c. 150	1	7	0	8
2 *Me Btty*, c. 100 (Hall)	0	0	0	0
Unattached Cavalry, c. 600	0	0	0	0
6 *Oh Cav*, c. 400	0	0	0	0
3 *WVa Cav*, c. 200	0	0	0	0

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Table 9. Battle of Cross Keys - 8 June 1862 - Confederate Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
CONFEDERATE FORCES, c. 7850	44	242	15	301
Maj. Gen. Thomas J. Jackson				
Jackson's Division (det), c.800	3	10	0	13
Maj. Gen.Thomas J. Jackson				
2nd Brigade, c. 800	3	10	0	13
Col. John Patton				
21 Va, c. 300 (unengaged)				
42 Va, c. 300	0	3	0	3
48 Va, c. 300	3	7	0	10
1 Va Bn, c. 200	0	0	0	0
Ewell's Division, c. 7050	41	232	15	288
Maj. Gen. Richard S. Ewell				
2nd Brigade, c. 1450	7	65	0	72
1 Md, c. 500	0	28	0	28
44 Va, 130	1	3	0	4
52 Va, c. 300	2	24	0	26
58 Va, c. 400	0	5	0	5
Brockenbrough's Md Btty, c. 50	2	0	0	2
Lusk's Va Btty c. 50	2	3	0	5
4th Brigade, c. 1450—Brig. Gen. Arnold Elzey (w)	6	33	9	48
12 Ga, c. 400	2	11	0	13
13 Va, c. 400	2	14	1	17
25 Va, c. 300	0	0	0	0
31 Va, 300	0	0	0	0
Raine's Va Btty, c. 50	2	7	8	17
7th Brigade, c. 1750—Brig. Gen. Isaac Trimble	23	109	6	138
15 Ala, c.400	9	37	5	51
21 Ga, c. 500	4	23	1	28
16 Miss, c. 400	6	28	0	34
21 NC, c. 400	2	11	0	13
Courtney's Va Btty, c. 50	2	10	0	12
8th Brigade, c. 2400—Brig. Gen. Richard Taylor	2	15	0	17
6 La, unengaged	0	0	0	0
7 La, c. 600	1	8	0	9
8 La, c. 500	1	7	0	8
9 La, unengaged	0	0	0	0
1 La Bn, unengaged	0	0	0	0

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Table 10. Battle of Port Republic - 9 June 1862 - Union Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
UNION FORCES, c. 3450	68	360	510	940
Brig. Gen. James Shields		–		
3rd Brigade, c. 1627	51	214	431	696
Brig. Gen. Erastus Taylor				
5 Oh, c. 500	4	43	197	244
7 Oh, c. 327	10	55	10	75
29 Oh, c. 400	17	41	114	172
66 Oh, c. 400	20	75	110	205
4th Brigade, c. 1550	13	135	65	213
Col. Samuel S. Carroll				
7 Ind, c. 400	9	107	29	145
84 Pa, c. 300	1	10	21	32
110 Pa, c. 300	1	10	15	26
1 WVa, c. 400	0	0	0	0
1 WVa Cav, c. 400	2	8	0	10
Artillery, c. 300	4	13	14	31
Btty M, 1 Oh Art, c. 100 (Huntington)	2	4	5	11
Btty L, 1 Oh Art, c. 100 (Robinson)	1	4	6	11
Btty E, US 4 Art, c. 100 (Clark)	1	5	3	9

Table 11. Battle of Port Republic - 9 June 1862 - Confederate Order of Battle

	KILLED	WOUNDED	MISSING	TOTAL
CONFEDERATE FORCES, 8670	91	697	36	824
Maj. Gen. Thomas J. Jackson				
Jackson's Division, c. 3750	13	164	32	209
Maj. Gen. Thomas J. Jackson				
1st Brigade, c. 1400—Brig. Gen. Charles Winder	13	145	31	189
2 Va, 224	1	24	0	25
4 Va, 317	0	4	0	4
5 Va, 447	4	89	20	113
27 Va, 150	8	28	11	47
33 Va, 260	0	0	0	0
2nd Brigade, c. 800—Col. J.A. Campbell	0	7	0	7
21 Va,		0		
42 Va, c. 300	0	0	0	0
48 Va, c. 300	0	7	0	7
1 Va Bn, c. 200	0	0	0	0
3rd Brigade, c. 1200—Brig. Gen. William B. Taliaferro	0	3	0	3
10 Va, c. 400	0	0	0	0
23 Va, c. 400	0	0	0	0
37 Va, c. 400	0	3	0	3
Artillery, c. 350	0	9	1	10
Carpenter's Va Btty, 70	0	4	0	4
Carrington's Va Btty	0	0	0	0
Caskie's Va Btty	0	1	0	1
Cutshaw's Va Btty	0	0	0	0
Poague's Va Btty, 71	0	4	1	5
Wooding's Va Btty	0	0	0	0

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Table 11 -- Continued.

Ewell's Division, c. 4920	78	533	4	615
Maj. Gen. Richard S. Ewell				
2nd Brigade, c. 1220—Col. W.C. Scott	30	169	0	199
1 Md, c. 450	0	1	0	1
44 Va, c. 120	14	35	0	49
52 Va, c. 250	12	65	0	77
58 Va, c. 400	4	68	0	72
4th Brigade, c. 1400—Col. John Walker	15	109	4	128
12 Ga, c. 400	0	1	0	1
13 Va, c. 400	0	0	0	0
25 Va, 300	0	29	0	29
31 Va, 300	14	79	4	97
8th Brigade, c. 2400—Brig. Gen. Richard Taylor	33	255	0	288
6 La, c. 600	11	55	0	66
7 La, c. 600	8	115	0	123
8 La, c. 500	8	30	0	38
9 La, c. 500	4	36	0	40
1 La Bn, c. 200	2	19	0	21

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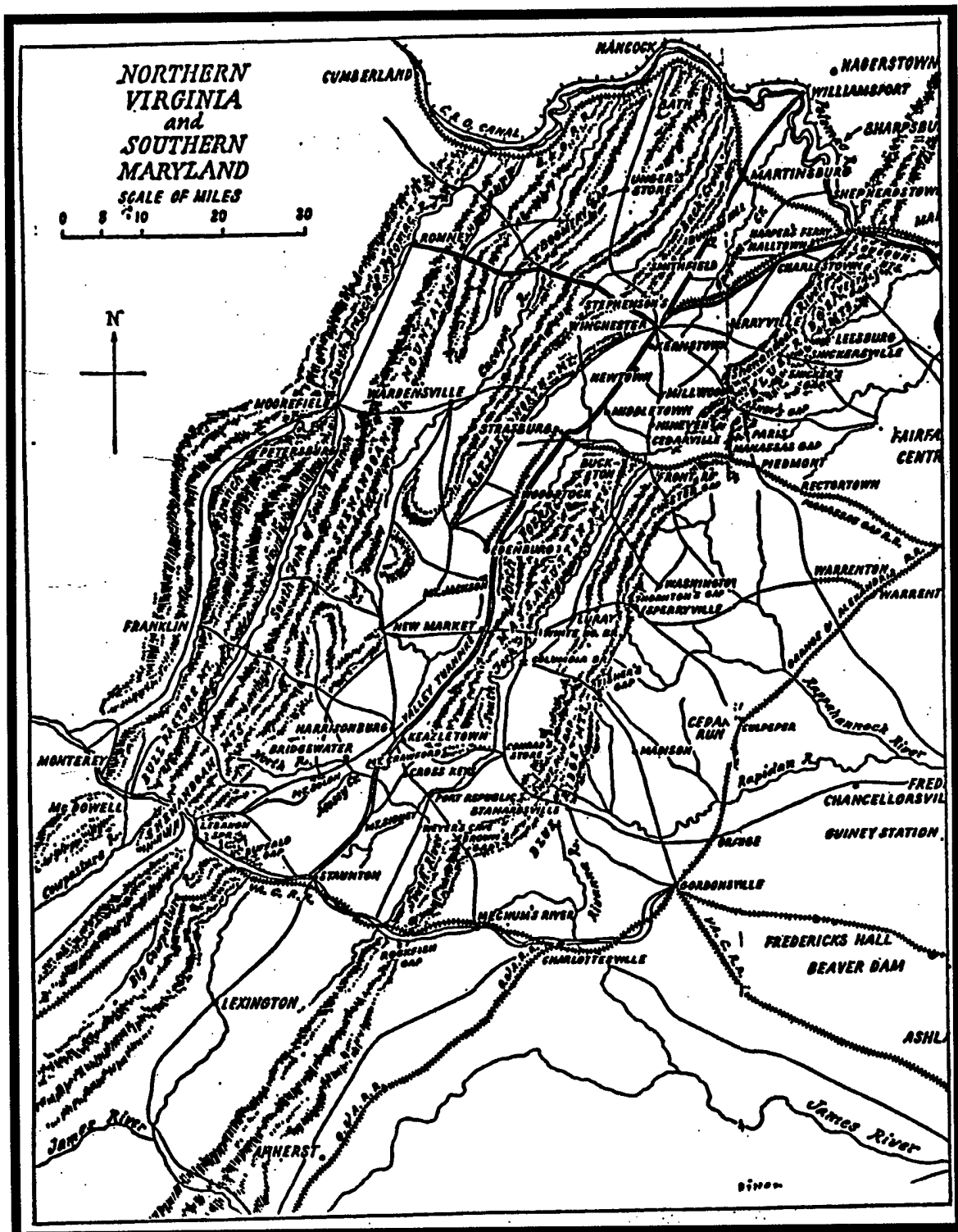
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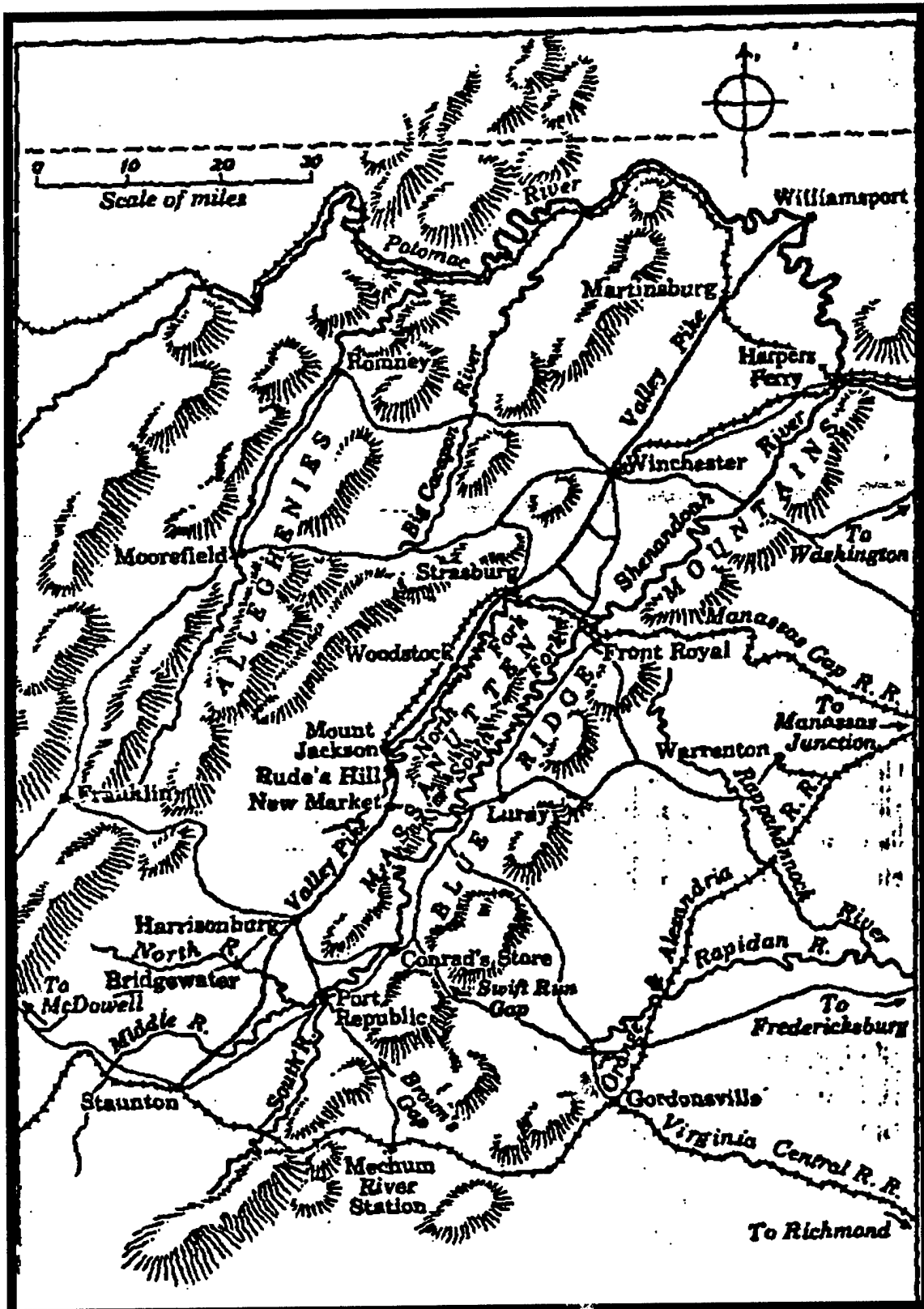
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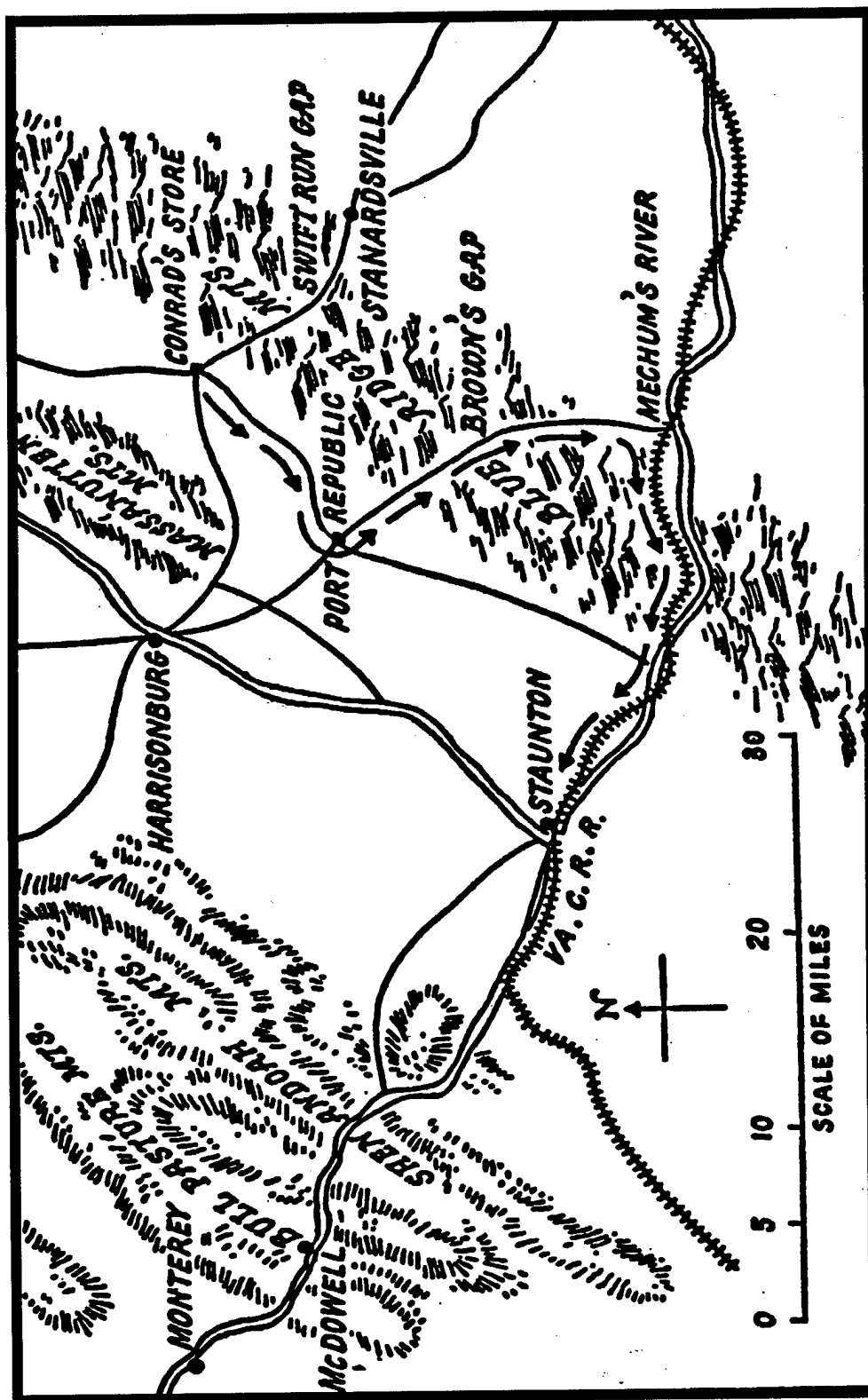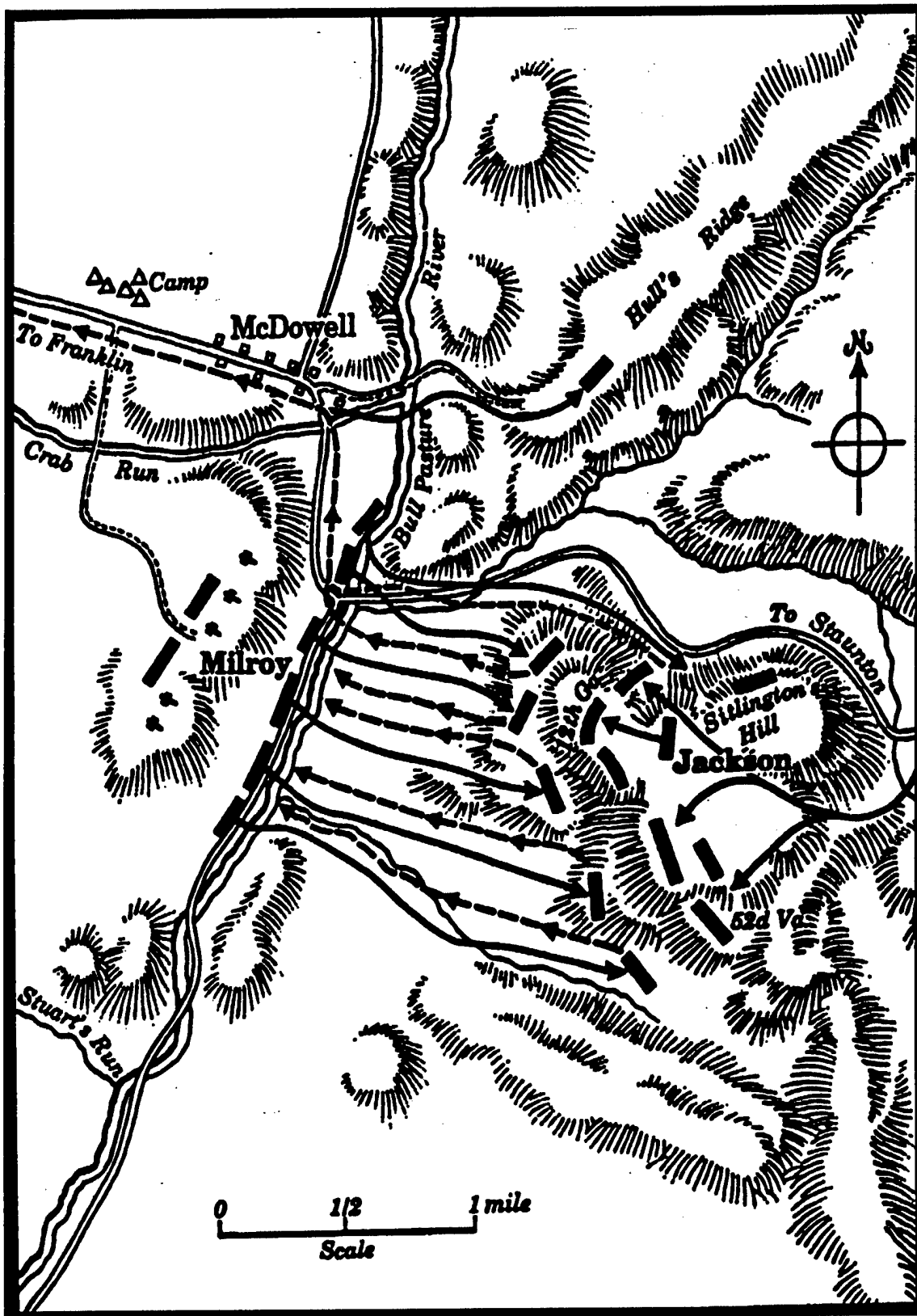*Stonewall in the Valley* (Mechanicsburg, PA: Stackpc   ks, 1996), 116.
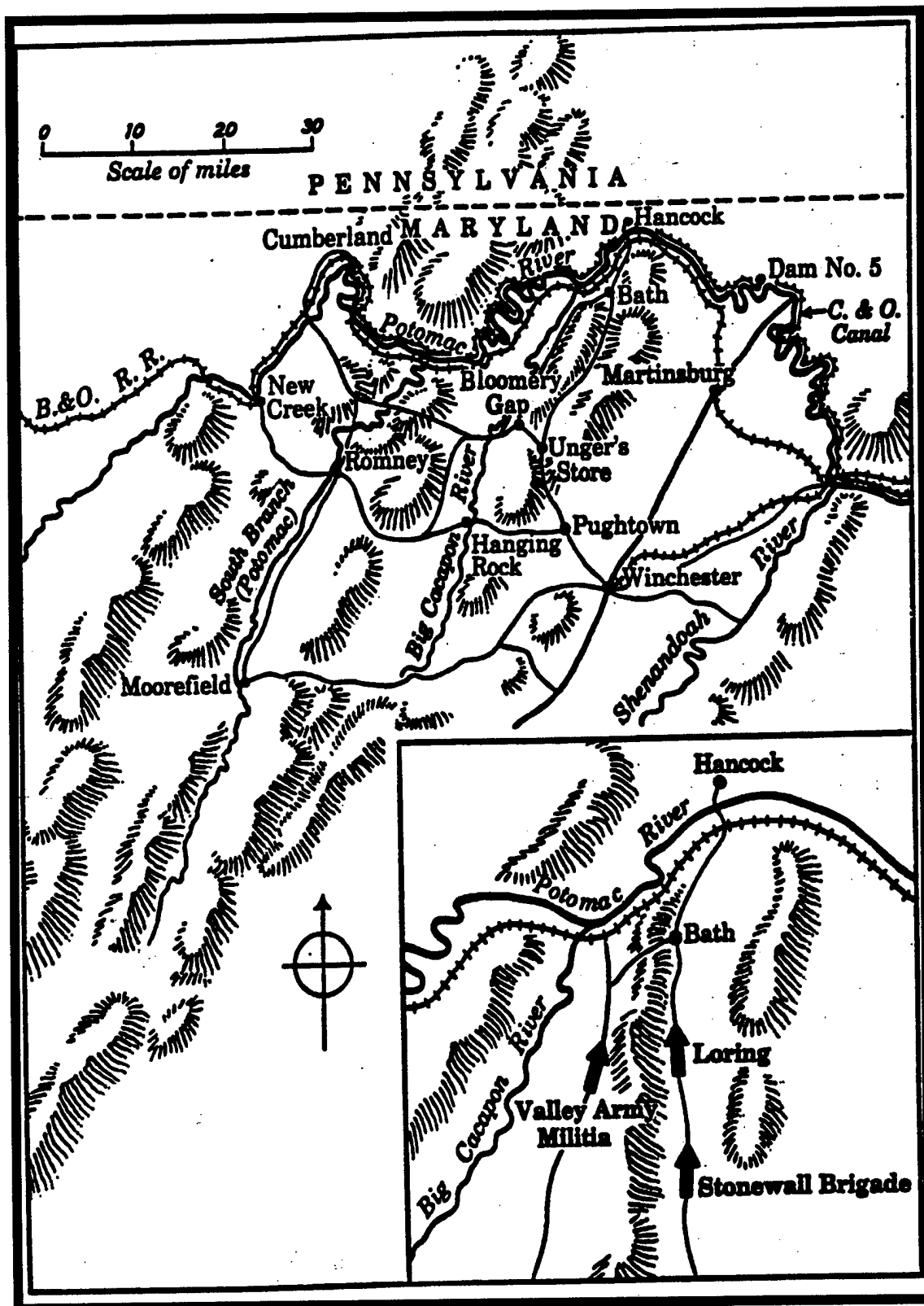
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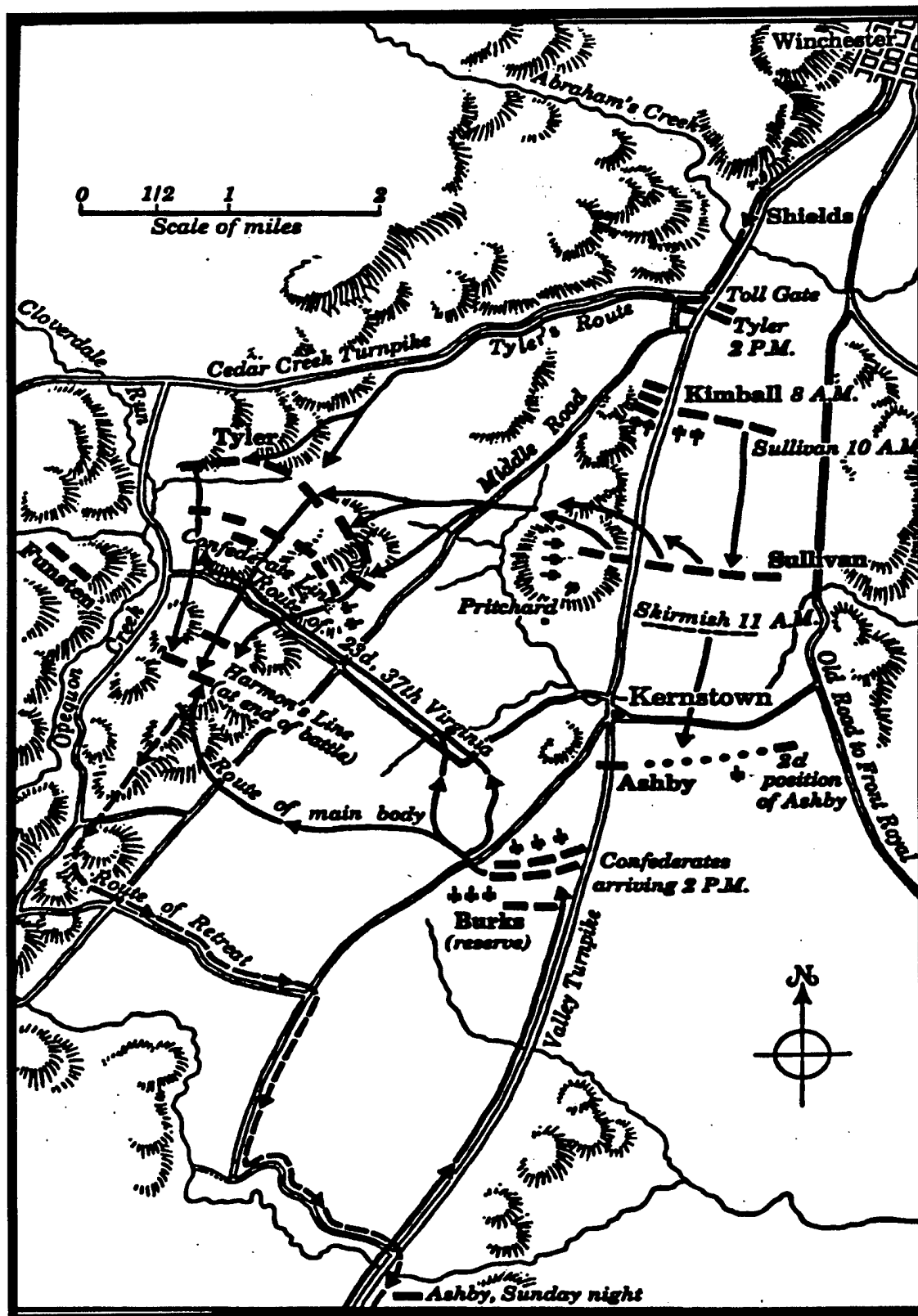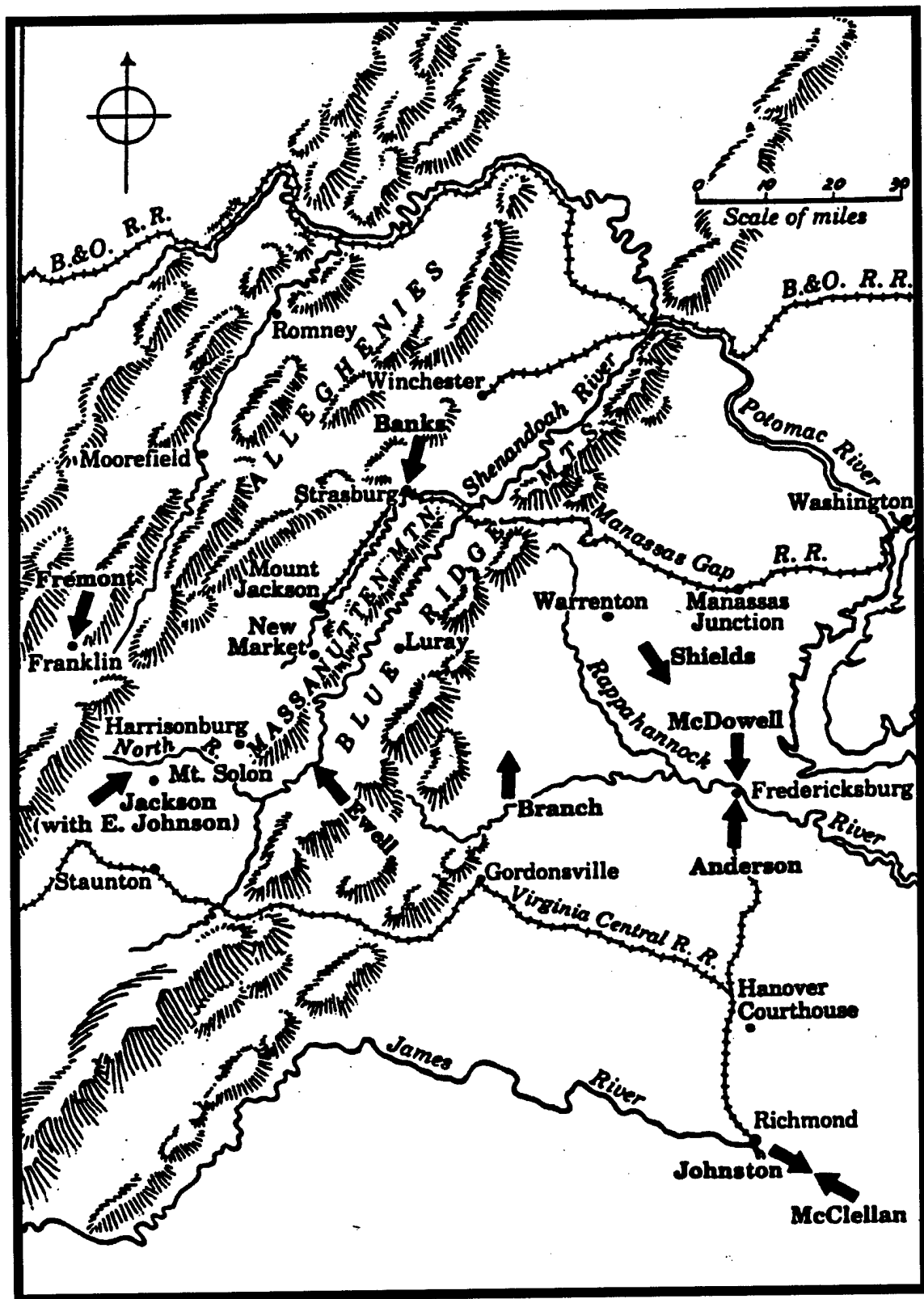
Figure 4. Battle of Kernstown (Full Battle), March 23, 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 123.

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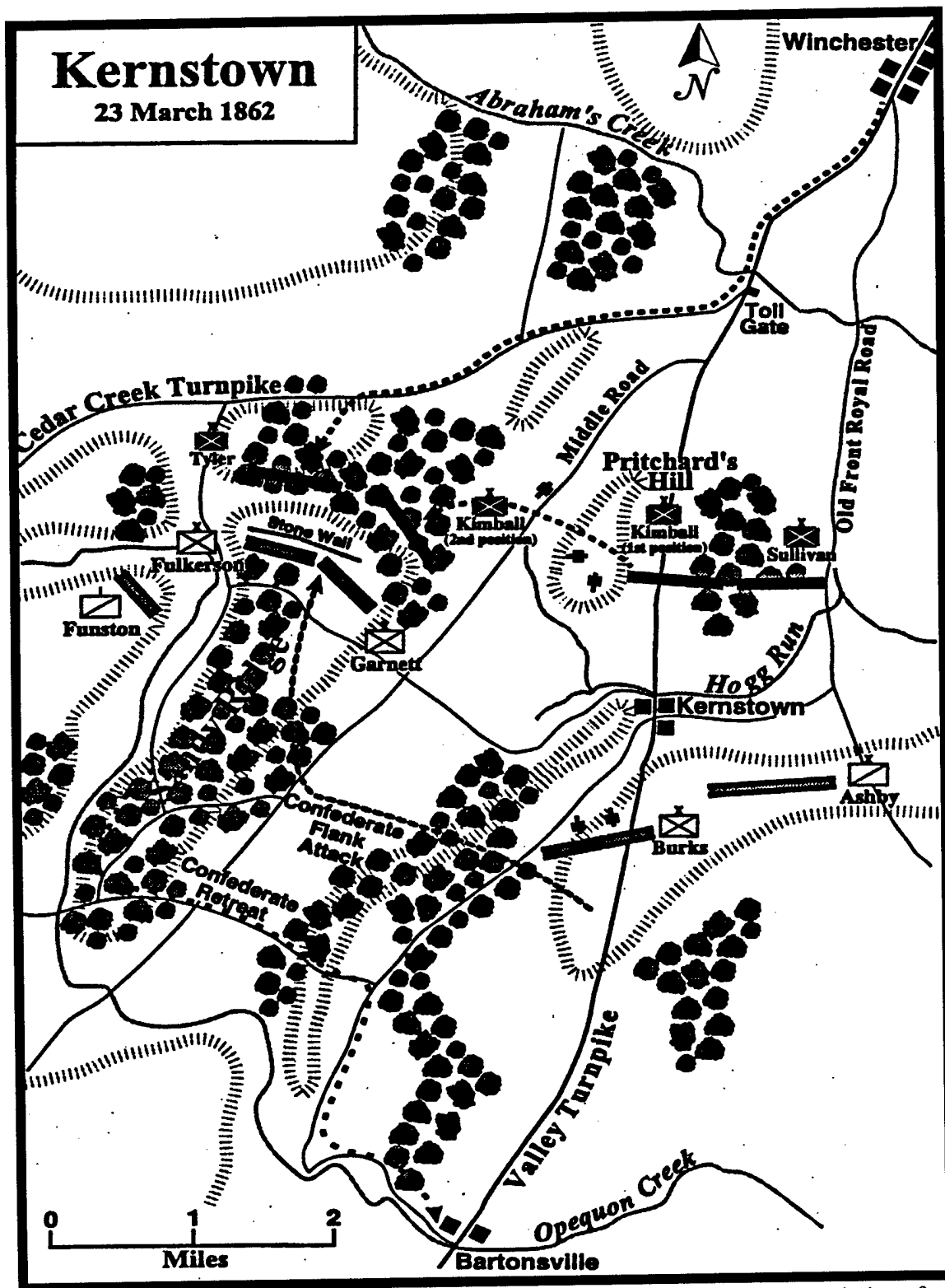
Figure 5. Battle of Kernstown (Flank Attack), March 23, 1862 Source: Reprinted, by permission of the publisher, from David Martin, *Jackson's Valley Campaign* (Conshohocken, PA: Combined Books, Inc., 1994), 46.
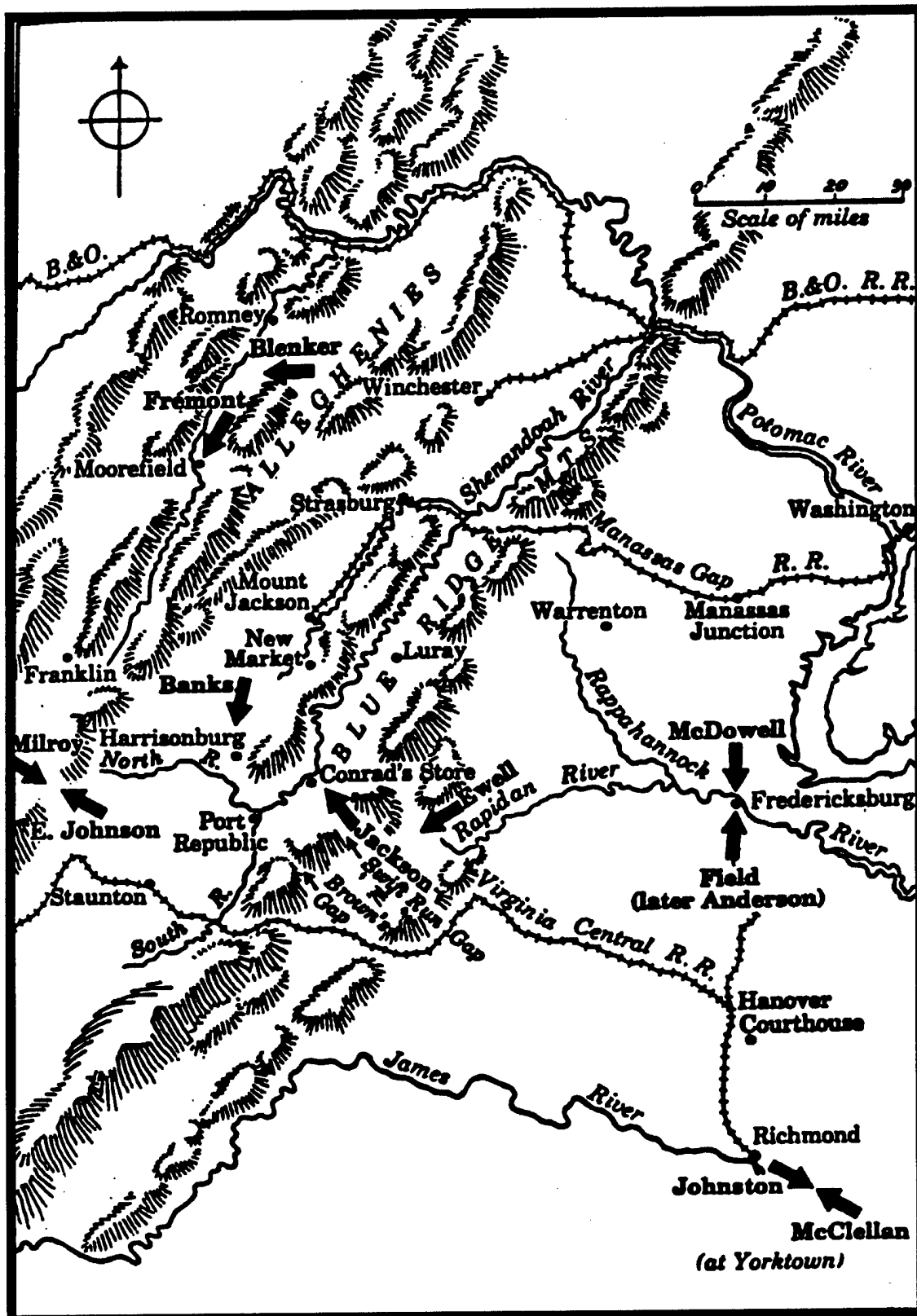
Figure 6. General Situation, 30 April 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 173.

Figure 7. Approach to McDowell, 5 to 7 May 1862 Source: Reprinted, by permission of the publisher, from Lenoir Chambers, Stonewall Jackson (New York: William Morrow & Company, 1959), 498.

Figure 8. Battle of McDowell, 8 May 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 188.

Figure 9. General Situation, 18 May 1862 Source: Reprinted, by permission of the publisher, from
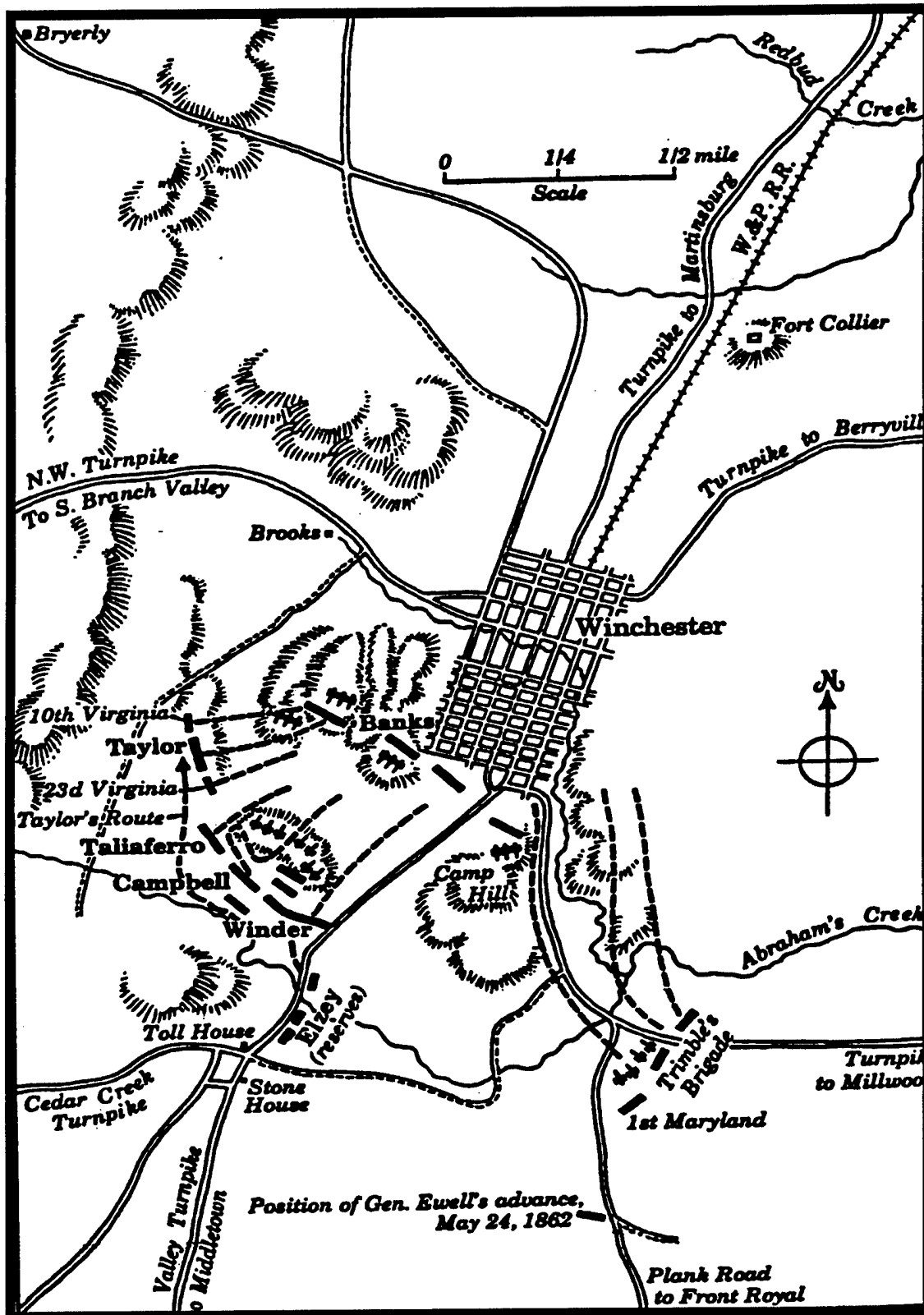Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 229.
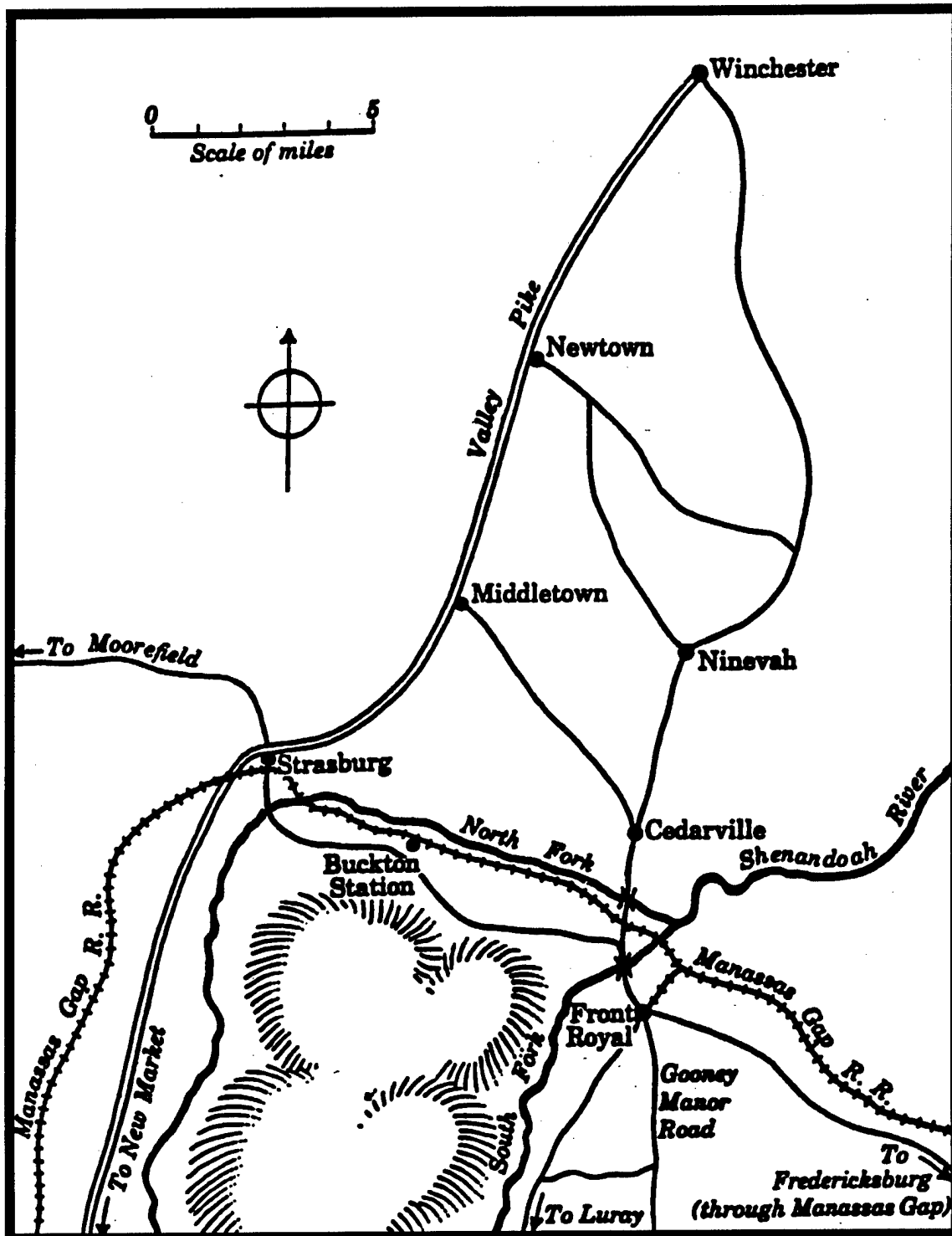
Figure 10. Jackson's Operational Triangle, 23 to 25 May 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 266.
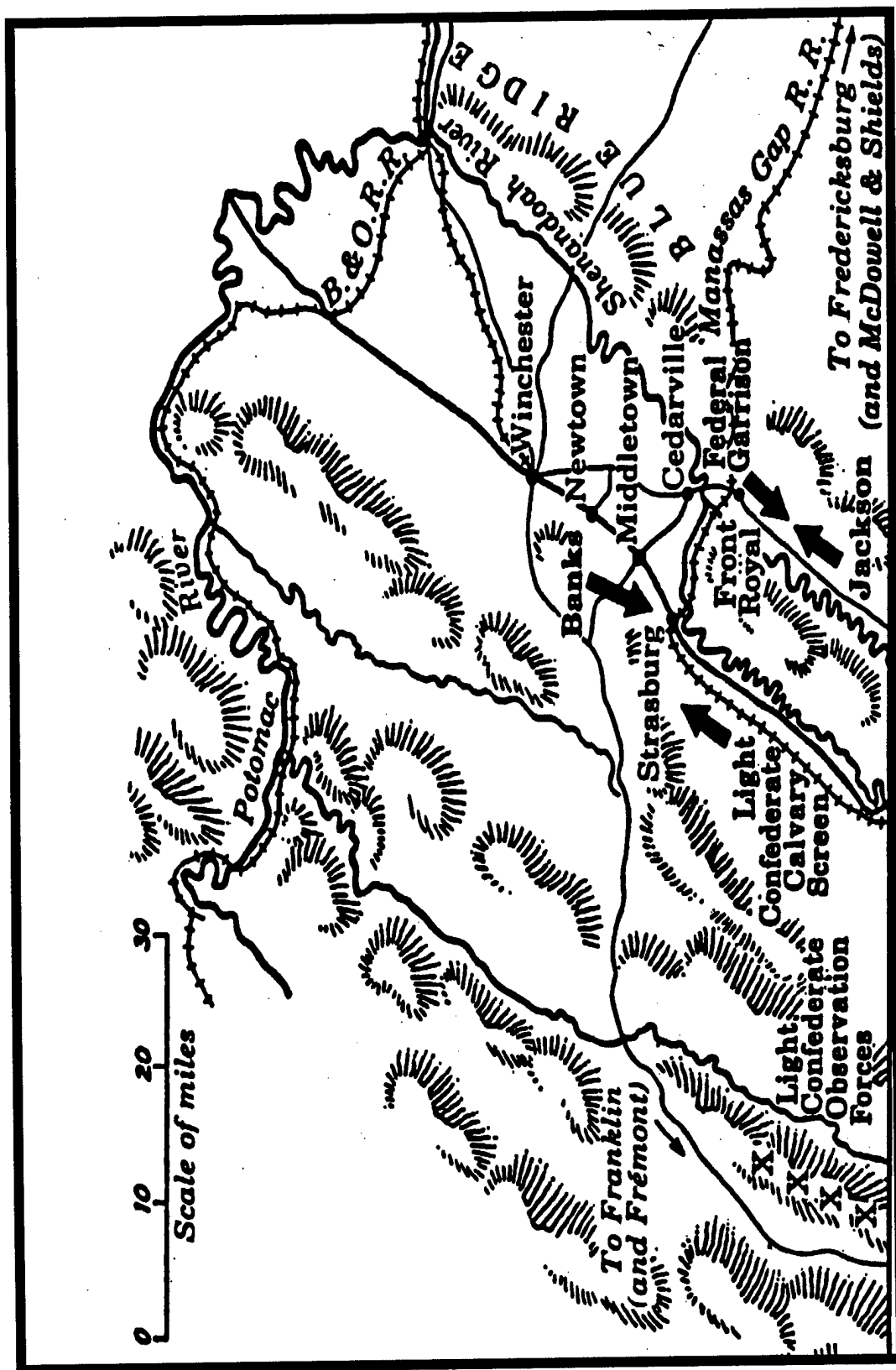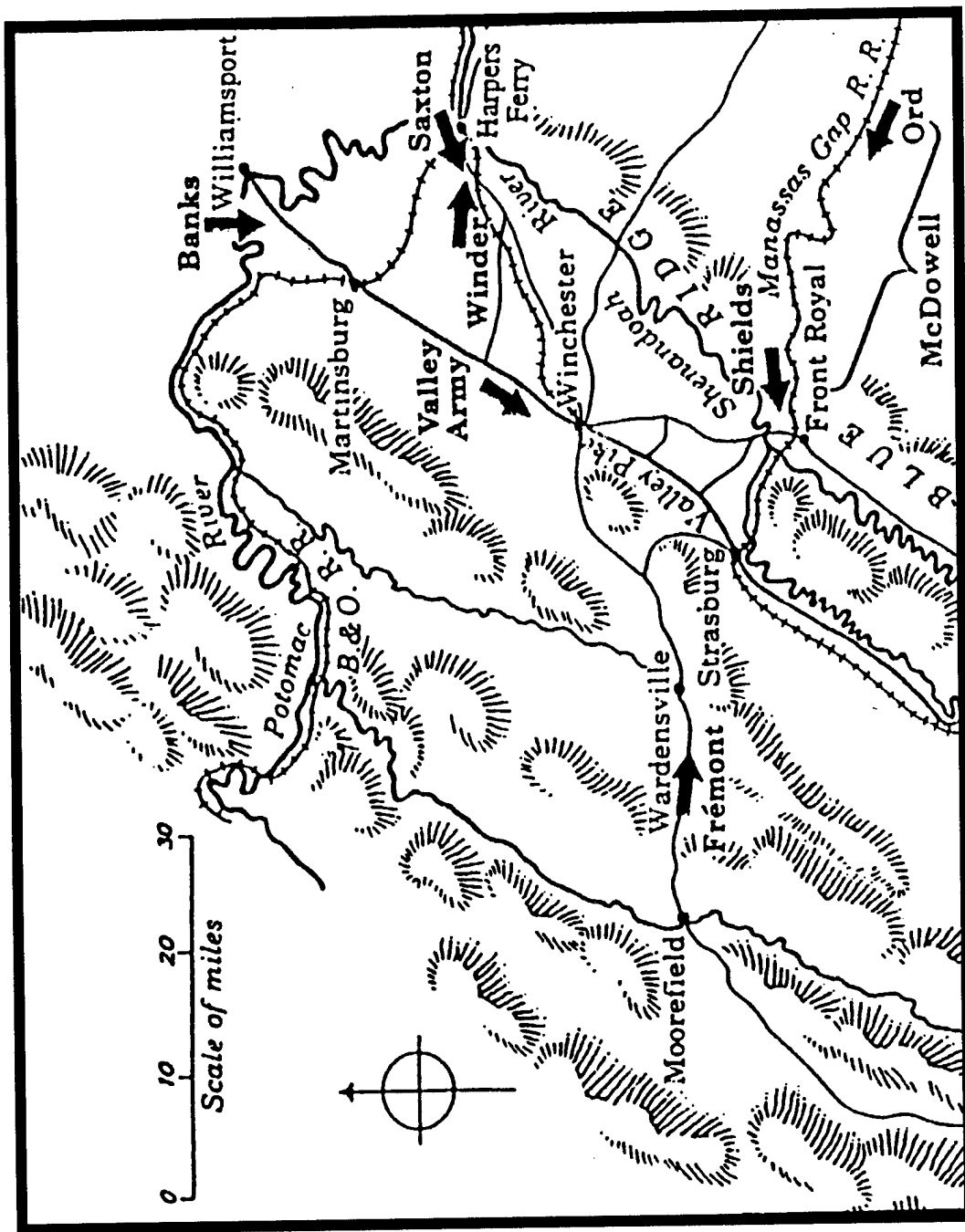
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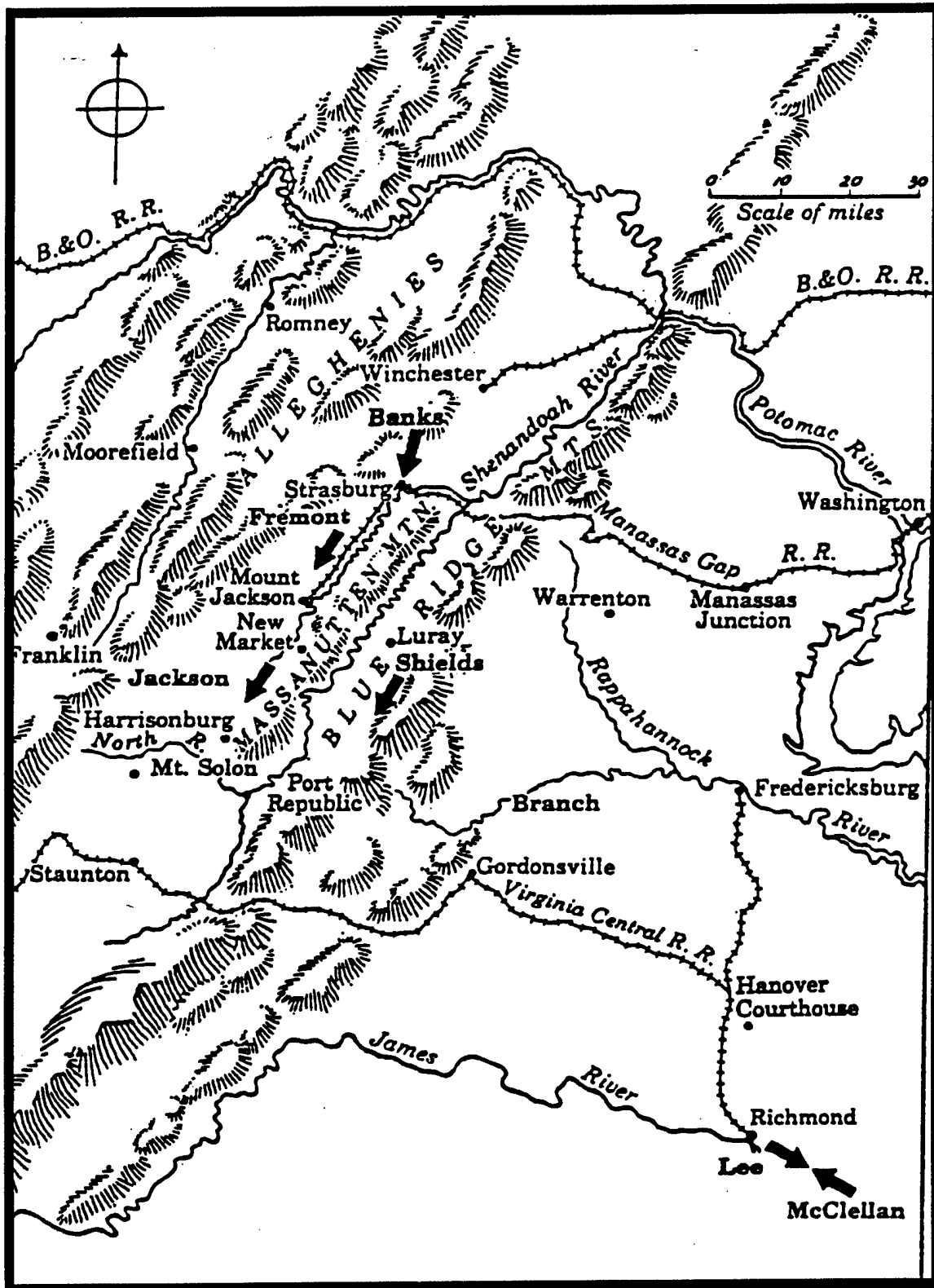
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Figure 13. General Situation, 31 May 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 334.

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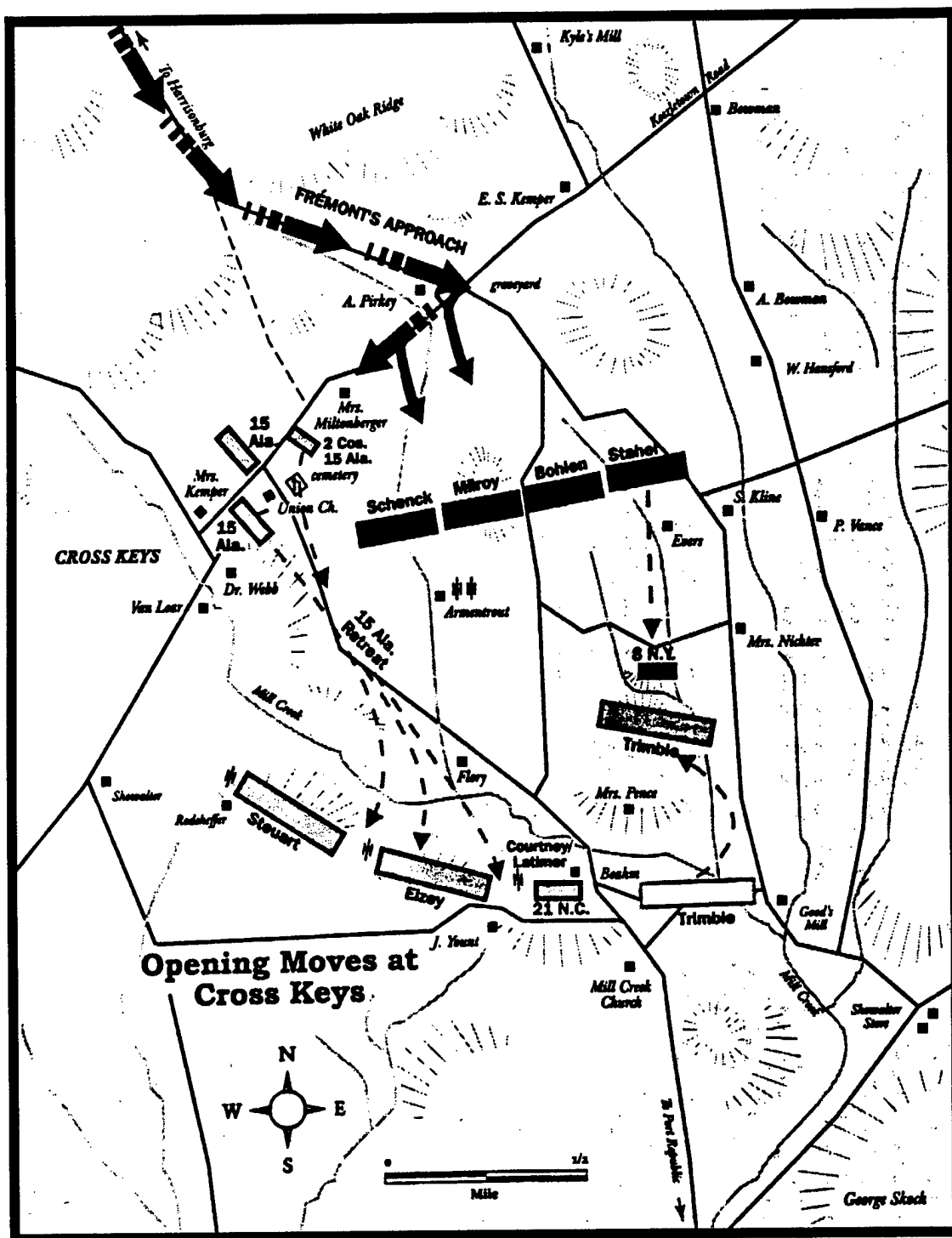
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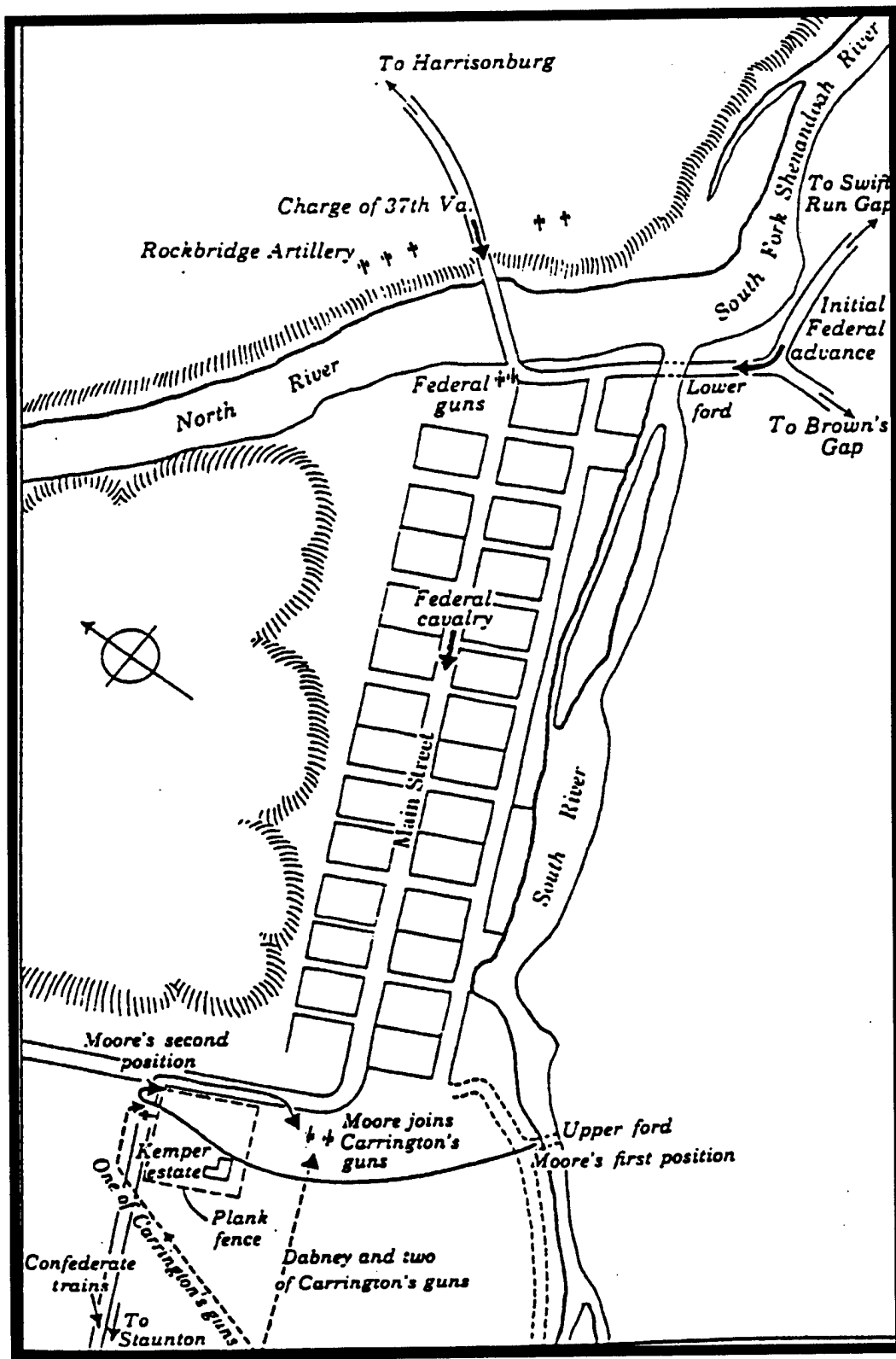
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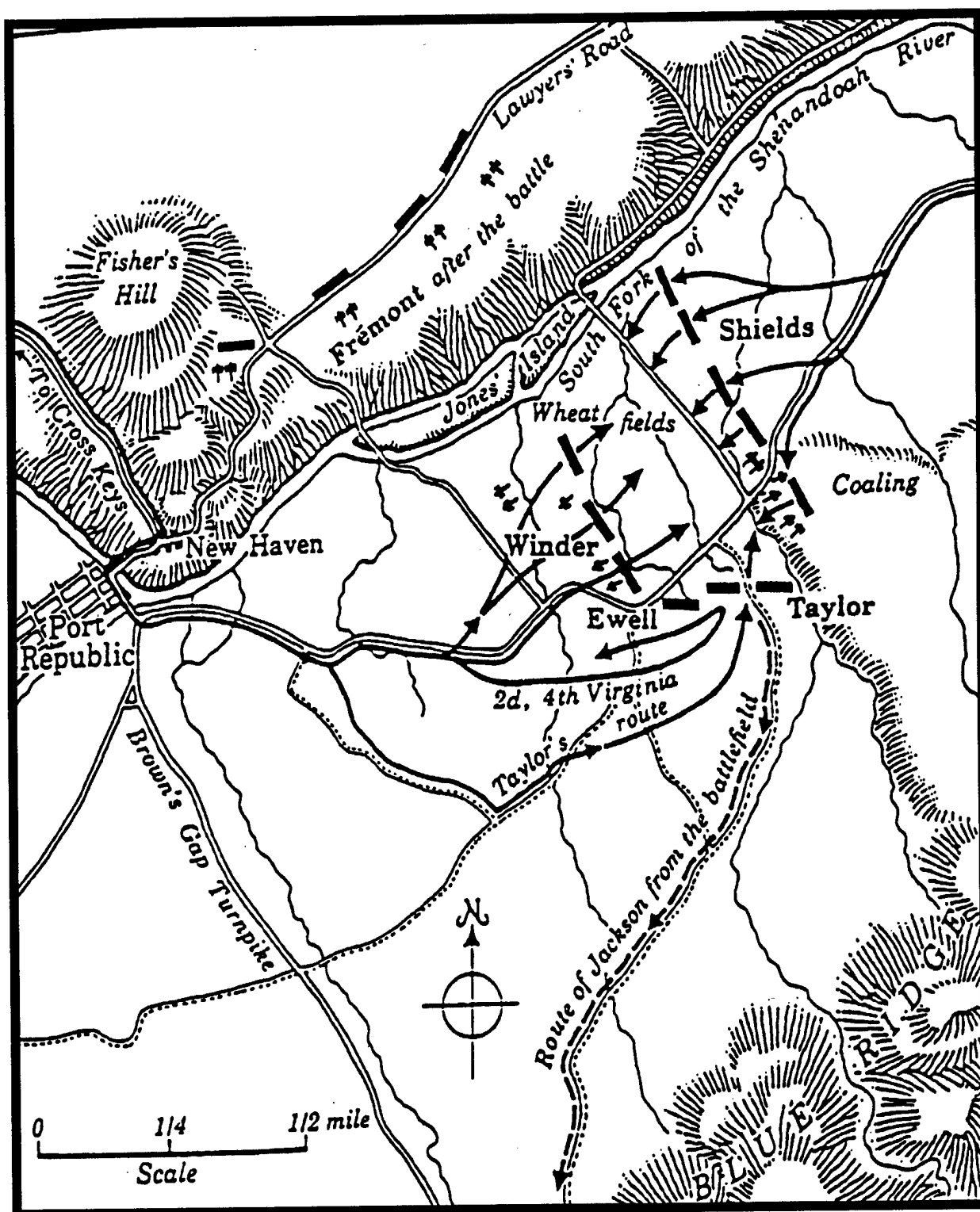
Figure 17. Battle of port Republic, 9 June 1862 Source: Reprinted, by permission of the publisher, from Robert Tanner, *Stonewall in the Valley* (Mechanicsburg, PA: Stackpole Books, 1996), 401.

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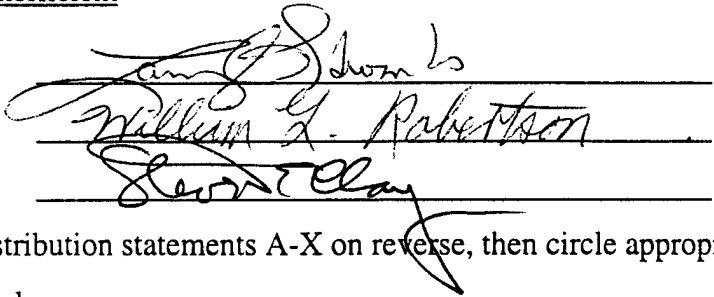
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